

DOCUMENT RESUME

ED 421 064

HE 031 408

TITLE National Student Loan Data System. Participant's Guide.
INSTITUTION Office of Postsecondary Education, Washington DC. Student
Financial Assistance Programs.
PUB DATE 1998-06-00
NOTE 196p.
PUB TYPE Guides - Classroom - Learner (051)
EDRS PRICE MF01/PC08 Plus Postage.
DESCRIPTORS College Administration; Compliance (Legal); *Computer
Software; *Databases; Eligibility; Higher Education;
*Recordkeeping; Student Financial Aid; *Student Loan
Programs; Workshops
IDENTIFIERS Higher Education Act Title IV; *National Student Loan Data
System

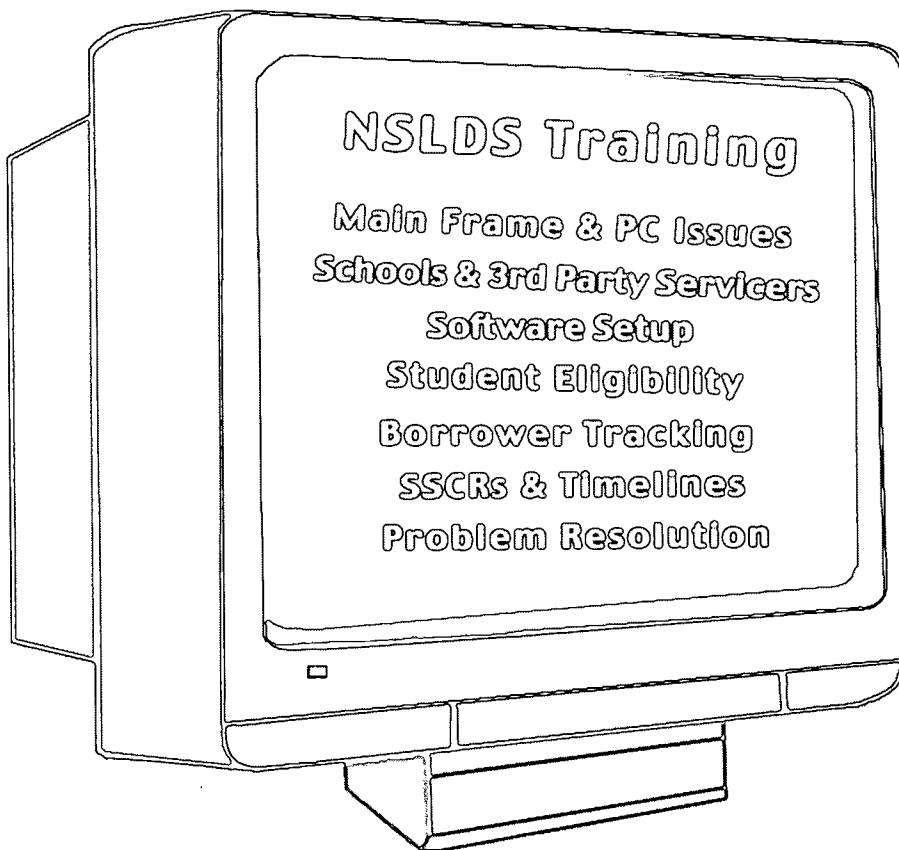
ABSTRACT

This guide provides the materials necessary for a two-day 10-session workshop on the National Student Loan Data System (NSLDS) and is intended for appropriate personnel at institutions of higher education. Main objectives for participants in the workshop include being able to, first, explain how NSLDS works; second, navigate through the NSLDS function screens effectively; and, third, use NSLDS to comply with Title IV student financial aid requirements. The 10 sessions cover the following topics: (1) overview of NSLDS and its functions, (2) timelines, (3) problem resolution, (4) connecting to NSLDS, (5) ~~school and third-party~~ servicer responsibilities, (6) software setup, (7) student eligibility, (8) borrower tracking, (9) student status confirmation reports, and (10) wrap-up. Provided for each session are: a list of session objectives, a list of session contents, and the session material, displayed in half pages to allow space for note-taking during the presentation. (DB)

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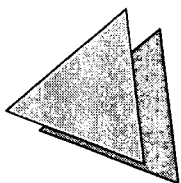
National Student Loan Data System Participant's Guide

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Introductory Session

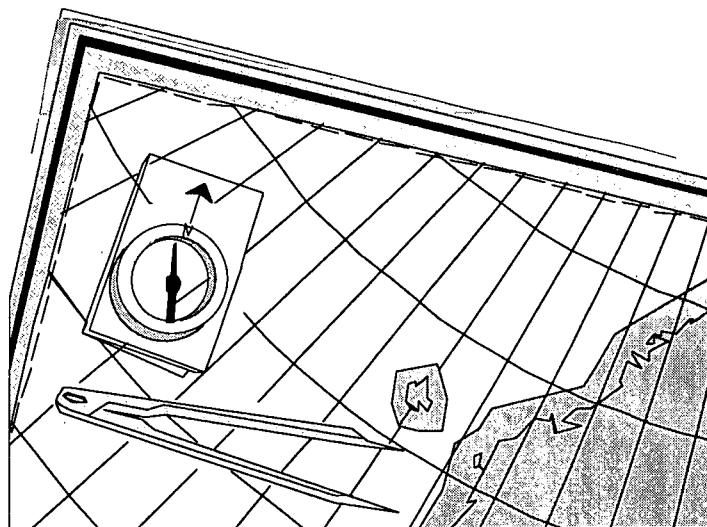
Objectives

After completing the workshop, you will be able to:

- ◆ explain how NSLDS works,
- ◆ navigate through the NSLDS function screens effectively, and
- ◆ use NSLDS to comply with Title IV student financial aid requirements.

Contents

- ◆ Overview of the Workshop
- ◆ Main Workshop Objectives
- ◆ Workshop Agenda
- ◆ Workshop Materials
- ◆ Recommendations



OVERVIEW OF THE WORKSHOP

NSLDS Information

- NSLDS has data on:
 - FFEL Program
 - Direct Loan Program
 - Perkins Loan Program
 - Pell Grant awards and disbursements
 - Pell Grant, FSEOG, and Perkins Loan overpayments

Notes:



MAIN WORKSHOP OBJECTIVES

- ◆ Explain how NSLDS works.
- ◆ Navigate through the NSLDS function screens effectively.
- ◆ Use NSLDS to comply with Title IV student financial aid requirements.

In addition:

- ◆ Participate actively.
- ◆ Be on time.

WORKSHOP AGENDA

Day 1

Introductory Session

Session 1: Overview of NSLDS and its Functions

Session 2: Timelines

Session 3: Problem Resolution

Session 4: Connecting to NSLDS

Session 5: School and Third-Party Servicer Responsibilities

Day 2

Session 6: Software Setup

Session 7: Student Eligibility

Session 8: Borrower Tracking

Session 9: Student Status Confirmation Reports

Session 10: Wrap Up

WORKSHOP MATERIALS

- ◆ Participant's Guide.
- ◆ NSLDS *Quick Reference Guide*.

Notes:



RECOMMENDATIONS

- ◆ Provide written feedback on NSLDS.
 - See recommendations sheet on next two pages.
 - Fill this out as we go along.

NSLDS RECOMMENDATIONS SHEET

Help ED improve NSLDS. Please use this sheet to write down your ideas and suggestions as you think of them.

Here are the suggestions that occurred to me during:

Session 1

Session 2

Session 3

Session 4

NSLDS RECOMMENDATIONS SHEET (CONT'D)

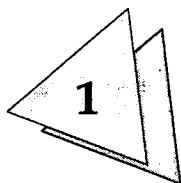
Session 5

Session 6

Session 7

Session 8

Session 9



Overview of NSLDS and its Functions

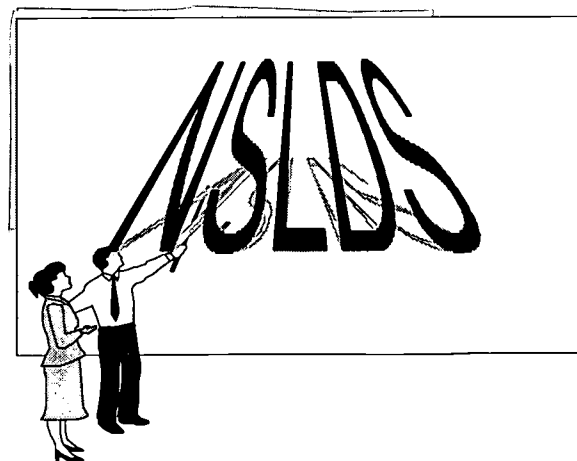
Objectives

After completing this session, you will be able to:

- ◆ describe the online functions of the National Student Loan Data System (NSLDS),
- ◆ explain how the eligibility of Title IV applicants is determined using the prescreening/postscreening process,
- ◆ describe Financial Aid Transcripts in NSLDS,
- ◆ explain how the borrower's enrollment status is monitored using Student Status Confirmation Reports,
- ◆ describe how defaulted borrowers are tracked, and
- ◆ explain how NSLDS searches for data.

Contents

- ◆ Introduction
- ◆ Data Providers
- ◆ Determining Eligibility
- ◆ Enrollment Tracking
- ◆ Borrower Tracking



INTRODUCTION

Notes:



NSLDS Statistics

- Over 100 million loans (FFEL, Direct, Perkins)
- Over 18 million Pell Grants
- Over 17,000 schools
- Over 29,000 school branches
- Over 30,000 lenders
- 66 guaranty agencies (36 active)

NSLDS Goals

- Improve student-aid-data quality and accessibility
- Reduce administrative burden
- Minimize fraud and abuse

Online Functions of NSLDS

- Online functions include:
 - Financial Aid Transcripts (FATs)
 - Student Status Confirmation Reports (SSCRs)
 - Overpayment reporting
 - Borrower tracking
 - Online contact

DATA PROVIDERS

Notes:

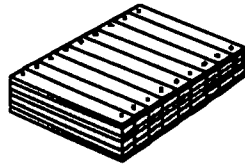


ED's Internal Data Sources

- Central Processing System (CPS)
- ED's Debt Collection Service
- Postsecondary Education Participant System (PEPS)
- Federal Direct Loan Program
- Federal Pell Grant Recipient Financial Management System (PGRFMS)

ED's External Data Sources

- Guaranty agencies
- Schools (or their third-party servicers)
- Lenders (or their servicers)



DETERMINING ELIGIBILITY

Prescreening

Prescreening provides schools with data on students who are previous financial aid recipients.

Prescreening

- Prescreening identifies individuals who have:
 - defaults on Title IV loans
 - overpayments on Pell Grants, FSEOGs, and Perkins Loans
 - approached loan eligibility for a single year

Notes:



Postscreening

Postscreening identifies students whose status has changed.

Postscreening

NSLDS will scan its database to find cases where a student's status changes because of:

- defaulted loans
- satisfactory loan repayment arrangements
- overpayments


```

RC5A      _   Loan Detail(LD)   Name History(NH)   Attendance History(AH)

                                NSLDS                                03-02-1998
                                Financial Aid Transcript Summary Part 2      12:15:52

SSN.....: 001285951  First Name: IDA   DOB: 10-02-1937   Schl Yr...: 1998
Curr SSN: 043906703  Last Name.: BENNINGTON                Name Hist: Y
Perkins Loans
Cumulative Loan Amount.....: $2,500   Current Year Loan Amount: $   N/A
First Disb. Prior to 10-01-1992: N      Expanded Lending Option.: N

1994-95 Pell Payment Data                                     MORE:  +
School Code: 00156200  School Name: DEKALB COLG
Tran.....: 01          Sch. Amt....: $ 1,200   Disb. Amt.: $   600
Rem. Amt.:              % Sch. Used: 100.00    As of.....: 10-10-1996

School Code: 00256900  School Name: UNIV OF NEVADA LAS VEGAS
Tran.....: 01          Sch. Amt....: $ 1,200   Disb. Amt.: $   600
Rem. Amt.: $           % Sch. Used: 100.00    As of.....: 10-10-1996

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD

```

RC5A Financial Aid Transcript Summary Part 2

```

RC06      _   GA/School Information (GS)

                                NSLDS                                03-02-1998
                                Loan Detail By Loan Begin Date, Outstanding Bal. (Descending)      12:15:54

SSN.....: 043906703  First Name: TARA MARIE  DOB: 02-16-1975  Name Hist: Y
Curr SSN: 043906703  Last Name.: NUNEZ                MORE:  +

Loan Detail          Loan      Loan      Loan      GA      School      --Contact---
                    Amount     Begin     End       Code    Code        Code    Type

_ FFEL STAFFORD SUB  $5,500  09-03-1996  05-22-1997  733    0258900    700204  LNS
Status Cd ID as of 09-03-1996 Outst Bal. $2,750 as of 08-13-1996 Acad Lvl: 3

_ FFEL STAFFORD SUB  $5,500  08-29-1995  05-16-1996  733    0258900    827288  LEN
Status Cd ID as of 08-29-1995 Outst Bal. $5,500 as of 09-30-1995 Acad Lvl: 3

_ FFEL STAFFORD SUB  $1,750  01-18-1995  05-18-1995  733    00258900   700043  LNS
Status Cd ID as of 01-18-1995 Outst Bal. $1,750 as of 06-30-1996 Acad Lvl: 2

_ FFEL STAFFORD SUB  $1,750  09-05-1994  05-13-1995  733    00257200   700043  LNS
Status Cd ID as of 09-05-1994 Outst Bal. $1,750 as of 06-30-1996 Acad Lvl: 2

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F9=STATUS CODE LIST  F10=SELECT SORT ORDER

```

RC06 Loan Detail 14

Notes:

- any defaults on Title IV loans
- any overpayments on Title IV aid programs
- the amount of aid for a single year (or cumulative aid)

Overpayments on a Pell Grant, FSEOG, or a Perkins Loan are reported to NSLDS and appear on Institutional Student Information Records (ISIRs), Student Aid Reports (SARs), and NSLDS's online screens.

```

                                NSLDS                                03-02-1998
                                PELL Aid Overpayment Summary        12:16:08

School Code: 00104500      School Name: STONEWALL JACKSON STATE JUNIOR
SSN: 444444444      Name: ALYCIA      P      RENEE      DOB: 01-17-1968
                                MORE:

Sel Disbursement Date Type Ovrpmt      Date Repaid      School/Br      Source      Reg      Inact
      (MM - DD - CCYY)      Indr      (MM - DD - CCYY)      Code      Code      Flg
-      09 - 12 - 1997      PE      Y      01 - 26 - 1998      00104500      SCH
-      01 - 26 - 1998      PE      R      01 - 26 - 1998      00104500      SCH

Valid Types are: Pell (PE), FSEOG (SE), Perkins (PK)
Valid Overpayment Indicators are: Overpayment (Y), Repaid (R),
                                Satisfactory arrangement made (S)
Valid Sources are: School (SCH), Transfer to/from ED (TRF), ED DCS (EDR)

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT      F7=BACKWARD      F8=FORWARD

```

RC1D Aid Overpayment Summary (FAT)

ENROLLMENT TRACKING

Notes:



Student Status Confirmation Report

Student Status Confirmation Report (SSCR) information is used by FFEL lenders, guaranty agencies, and the Direct Loan servicer to verify a borrower's enrollment status. Accurate enrollment information is necessary to determine when a borrower is ready to enter repayment.

RC71 U_ Display Student(D) Update sscr(U) List Address(LA)
Past enrollment Status change(PS)

NSLDS 03-18-1998
SSCR Online Update 09:04:20

School/Branch Code... 00104600 TALLADEGA COLLEGE

SSN..043882658 First Name..COREY DOB..12-06-1974 (MM-DD-YYYY)

Last Name: REED Curr SSN.: 043882658

----- Current School Status Change (Mandatory) -----

Anticipated Completion Date..05-24-1998 (MM-DD-YYYY)

Enrollment Code..F Enrollment Code Effect Date....09-05-1997 (MM-DD-YYYY)

Certification Date.....09-15-1997 (MM-DD-YYYY)

Student Designator..741293 (Optional)

---- Student Information Change (Optional) ----

SSN..... First Name.. Middle Initial..

Last Name.. DOB..- - (MM-DD-YYYY)

--- Permanent Address Information (Optional)---

Address Line 1..2030 F ST. NW

Address Line 2..

City.....Minneapolis State..MN Zip Code..22563

Country..US Effective Date..09-05-1997 (MM-DD-YYYY)

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT

RC71 SSCR Online Update

RC7C

NSLDS
Student Address List

11-21-1995
12:37:48

First name: CHRIS Last name: LAMBART SSN: 037000002
Sel Please make a selection(S) and press ENTER MORE: +

- Address line 1: 1234 HICKERY STREET ONE
- Address line 2: ROSEMONT PLAZA
City.....: ROSEMONT State: PA Zip: 22051-0001
Country.....: UNITED STATES OF AMERICA Effective Date: 11-01-1995

- Address line 1: 1910 CHERRY LANE
- Address line 2: CAVALIER COURT
City.....: CHANTILLY State: VA Zip: 22031-1961
Country.....: U.S.A. Effective Date: 01-01-1993

- Address line 1: 423 WILSON BOULEVARD
- Address line 2: PROVIDENCE HALL
City.....: DALE CITY State: VA Zip: 32861-1995
Country.....: U.S.A. Effective Date: 11-24-1992

- Address line 1: 1906 GALLOWS ROAD
- Address line 2: MERRYFIELD HOUSING
City.....: MERRYFIELD State: VA Zip: 16411-1000
Country.....: U.S.A. Effective Date: 02-13-1991

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC7C Student Address List

RC7D __ Add(A) Change(C) DElete(DE)

NSLDS
Past Enrollment Status Change

03-13-1998
08:05:00

Sch/Br Code.: 00104800 TROY STATE UNIVERSITY @ DOTHAN
Student Name: COREY REED SSN: 043882658
Anticipated Compl Date: 12-15-1998 (MM-DD-YYYY) (MM-DD-YYYY)
Enrollment Code.. Effective Date..__-__-__ Cert Date..__-__-__

----- Current Status -----
Enroll Code: H Effec Date: 01-01-1998 Cert Date: 01-05-1998 Source: SSCR
Make a selection (S) and press ENTER for UPDATE or DELETE

Enroll MORE:
Sel Code Description Effect Date Certi Date
- A APPROVED LEAVE OF ABSENCE 10-01-1997 10-15-1997
- L LESS THAN HALF TIME 01-01-1994 02-15-1994

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC7D Past Enrollment Status Change



Borrower Tracking

- | | | | | |
|------|---|----------------------|--------------------|-------------------------|
| RC83 | — | Aid profile 1(A1) | Loan Detail(LD) | Lender History(LH) |
| | | Guar agency Hist(GH) | Attendance His(AH) | School servicer His(SH) |

```
Student Name: TOMMY          T AYALA          SSN: 122001669
PLUS Name...:                SSN:
Current School/Branch Code:
Current School Name.....:
City.....:                State:
```

	Loan	Certification/	Period	Period		Curr	MORE:
Sel	Type	Guaranty Date	Begin Date	End Date	Amount	Loan Status	Originating School/Branch
-	SF	07-17-1994	08-01-1994	05-31-1995	5000	RP	00371400
-	SF	10-26-1993	08-01-1993	05-31-1994	4200	RP	00371400
-	SU	08-30-1992	08-01-1992	05-31-1993	3800	RP	00371400

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC83 Loan History Selection

RC86 — Aid profile 1(A1) Lender History(LH) Guaranty agency History(GH)
School servicer History(SH) Loan history(LO)

NSLDS 04-24-1997
Loan Detail 09:22:15

Student Name: TOMMY T AYALA SSN: 122001669
PLUS Name.... SSN:
Loan Type: SF Amount: 5000 Certification/Guaranty Date: 07-17-1994
Period Begin Date....: 08-01-1994 Period End Date.....: 05-31-1995

Outstanding Principal Bal: 3000 Outstanding Principal Bal Date: 04-15-1997
Outstanding Interest Bal.: 150 Outstanding Interest Bal Date.: 04-15-1997

MORE:

-- Disbursement --		-- Cancellation --		---- Refund ----		---- Status ----	
Date	Amount	Date	Amount	Date	Amount	Date	Code
09-30-1994	2500					12-31-1995	RP
01-31-1995	2500						

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC86 Loan Detail

RC93 — Organization Contact(OC)

NSLDS 04-24-1997
Current Data Provider Information 09:10:12

Student/Borrower Name: TOMMY T AYALA SSN: 122001669
MORE
_ GA Code.....: 740 Name: OKLAHOMA GUARANTEED STUDENT LOAN PROGRAM
Street Address.....: P.O. BOX 3000
City.....: OKLAHOMA CITY State: OK Zip Code: 731010000
Resp Begin Date....: 08-30-1992

Name:

Street Address.....:

City.....:

State: Zip Code:

Name:

Street Address.....:

City.....:

State: Zip Code:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC93 Current Data Provider Information

How Does NSLDS Search for Data Online?

Locating Borrowers and Analyzing Loans

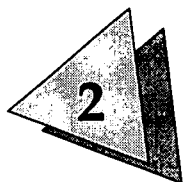
- NSLDS follows these steps to locate borrowers and to analyze their loans:
 - Step One: Searches for borrower records based on specific data elements.
 - Step Two: Retrieves the borrower record from the database.
 - Step Three: Displays the result of the search, online.

Notes:



In using NSLDS's functions, the first step is often to **populate the data screen** by entering information that will identify the student. Generally, this means the Social Security number, first name, and date of birth. When these three data items are entered, NSLDS will provide access to its information on the specified borrower. However, the Borrower Tracking and Aid Overpayment functions will permit school users to search the database with **just a Social Security number**.

- ◆ For example, this can help you identify borrowers who do not get prescreened due to comment code 138. This code appears on the SAR/ISIR when the SSN on the FAFSA is found in NSLDS, but the name on the FAFSA does not match the name in NSLDS.
- ◆ Limit your use of the SSN-only search to solving problems like this, since ED tracks users to safeguard against unwarranted "browsing" of records and to protect the privacy of borrowers in the database.



Timelines

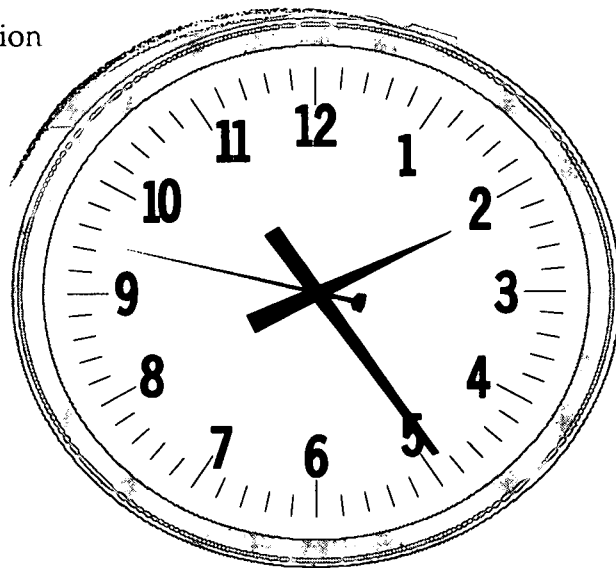
Objective

After completing this session, you will be able to:

- ◆ understand the dates and reporting requirements necessary to ensure compliance with ED's NSLDS functions.

Contents

- ◆ Student Status Confirmation Reports
- ◆ Reporting Federal Perkins Loan Information
- ◆ Reporting Overpayment Information



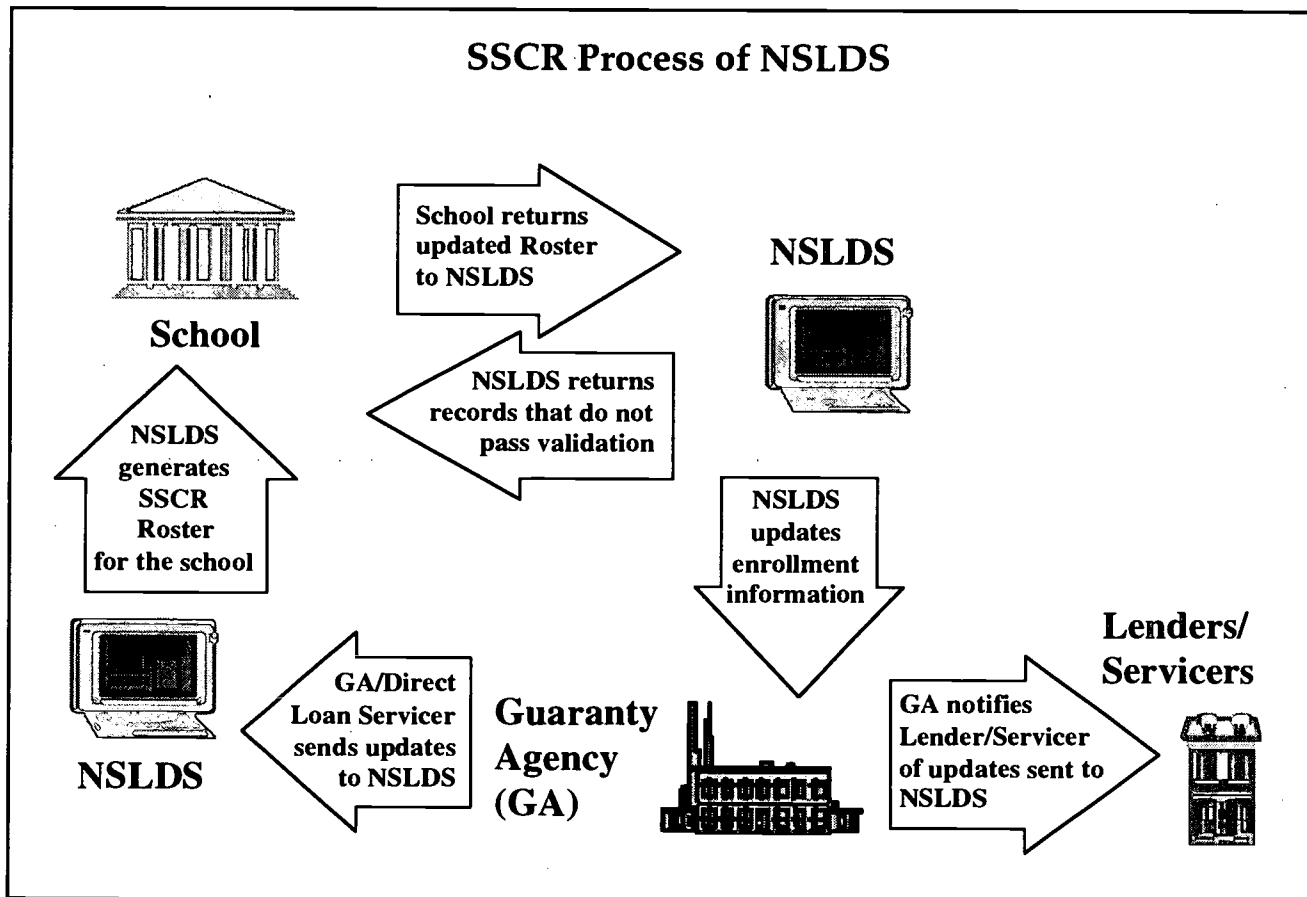
STUDENT STATUS CONFIRMATION REPORTS

NSLDS generates the SSCR Roster File and transmits it to the school via the Title IV Wide Area Network (Title IV WAN).

- ♦ Schools receive the SSCR Roster File in their Title IV WAN mailboxes.

Schools return the updated roster file, called the SSCR Submittal File, to NSLDS. NSLDS then forwards new and changed data to each affected guaranty agency and/or the Direct Loan servicer.

Notes:



SSCR Timeframes

Notes:



School SSCR Submission Schedule Requirements

- Minimum of two and maximum of six SSCRs in a 12-month period
- May not schedule SSCR rosters for successive months
- At least one SSCR required each regular term, if term-based school

School SSCR Submission Schedule Requirements (cont'd)

- If fewer than four SSCRs scheduled, must be scheduled at least four months apart
- Schools may change SSCR schedule at any time, as long as ED's scheduling requirements are met

Examples of SSCR Cycle Dates		
Semester Schools	Quarter Schools	Other Schools
September	October	October
November	December	December
January	February	February
March	April	April
May or June	June	June
		August

SSCR Submittal Files

According to 34 CFR 682.610(c) and 34 CFR 685.309(b), schools must return SSCR Submittal Files within 30 days.

- ♦ If schools do not comply, they are subject to fines or other ED administrative sanctions.

SSCR Error Notification Files

NSLDS generates an error report on receiving the school's roster file. The error report is called an SSCR Error Notification File.

The SSCR Error Notification File:

- ♦ is generated even if no errors appear in school's SSCR Submittal File
- ♦ documents school's compliance with SSCR requirements

- ♦ if there are errors, school must correct errors within ten days of date Error Notification File was generated
- ♦ all unresolved errors appear in next SSCR cycle
- ♦ if there are no errors, school need not respond
- ♦ school can correct errors online

Notes:



REPORTING FEDERAL PERKINS LOAN INFORMATION

Schools (or their third-party servicers) must report monthly on:

- ♦ new loans
- ♦ loans for which NSLDS required data

Schools must report information such as:

- ♦ changes in status
- ♦ name changes

When there are no changes on an active loan, schools may report quarterly.

REPORTING OVERPAYMENT INFORMATION

Under an Action Letter planned to be issued in July 1998, schools are required to enter all overpayment information into NSLDS by August 15, 1998.

Following this initial entry, schools must input new overpayment information into NSLDS no later than 30 days after becoming aware of:

- ◆ a new overpayment
- ◆ a change to a previously reported overpayment

Schools should report to NSLDS all overpayments that have not been cleared, including overpayments for which students have made satisfactory repayment arrangements. However, schools should not report overpayments:

- ◆ paid or otherwise resolved, or
- ◆ previously reported to ED's Debt Collection Service

Notes:



Problem Resolution

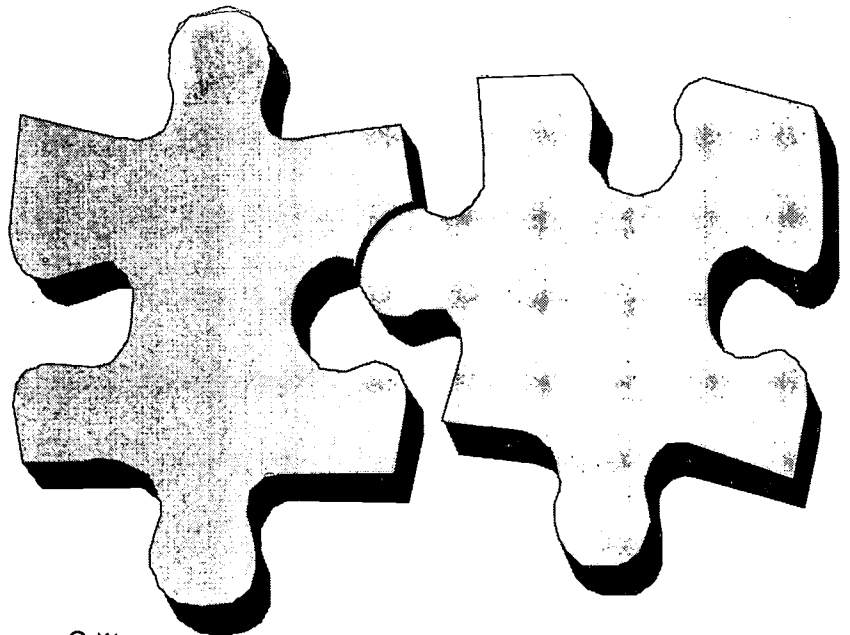
Objectives

After completing this session, you will be able to:

- ♦ identify the different NSLDS resources available to help schools, and
- ♦ use these resources to resolve problems.

Contents

- ♦ Customer Service Center
- ♦ Organization Contact Screens
- ♦ Problems That Schools Encounter



CUSTOMER SERVICE CENTER

Notes:



NSLDS Customer Service Center

- The Customer Service Center is operated by the NSLDS contractor:

NSLDS

Customer Service Center

1-800-999-8219

Monday-Friday*

8 a.m. - 8 p.m. (Eastern Time)

*except federal holidays

Customer Service Center Functions

- Resolve users' transmission problems
- Notify users of problems affecting system availability and performance
- Document users' problems and inquiries
- Identify users' training needs

Customer Service Center Functions (cont'd)

- Help resolve users' problems with NSLDS system/software, PC software/hardware, and missing/late reports
- Monitor and resolve problems with system availability, processing times, priorities, and related performance issues
- Answer security-related issues

ORGANIZATION CONTACT SCREENS

```

RC16      _  Display(D)

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                                NSLDS                                06-30-1998
                                Organization Contact Information        12:16:54

Organization Type... SCH      + Name: SCHOOL
Organization Code... 001045   + Name: STONEWALL JACKSON STATE JUNIOR COL      +
Organization Branch: 00

For Detailed Contact information make a (s)election and press ENTER.

```

Sel	Function	First Name	Last Name	Phone	Ext	MORE:
_	Primary Contact	STACY	WASHINGTON	703-232-9961	361	+
_	SSN/ID Issues	ROGER	PALFREY	703-232-9987	387	
_	FAT/SAR/ISIR Issues	KESHIA	TODD	703-232-9993	393	
_	Default Issues	ANNE	CULVER	703-232-9998	398	
_	Overpayment Issues	HUGH	WHITE	703-232-9975	375	
_	Perkins Issues	BETTY	SWEARINGER	703-232-9902	302	
_	FFEL Issues	JAMES	CHONG	703-232-9924	324	

```

F3=EXIT  F4=PROMPT  F7=BACKWARD  F8=FORWARD

```

RC16 Organization Contact Information (List—by Function)

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RC17

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                                NSLDS                                06-30-1998
                                Organization Contact Information Detail    12:16:55

Organization Code.: 00104500
Organization Name.: STONEWALL JACKSON STATE JUNIOR COL
Address.....:
City.....: RAINSVILLE                State: AL  Zip Code.: 35986-3333
Phone .....: 703-232-9000

Function.....: Perkins Issues

Contact Name First: BETTY                Update Date.....: 06-30-1998
                Last.: SWEARINGER
Title.....: LOAN MANAGER
Phone.....: 703-232-9902                Ext.: 302
Fax.....: 703-232-9119
E Mail.....: B_SWEARINGER@JACKSON.EDU
Address.....: HOLKER HALL ROOM 250
                3000 CAMPUS DRIVE
City.....: RAINSVILLE                State: AL  Zip Code.: 35986-3333

F3=EXIT  F4=PROMPT

```

RC17 Organization Contact Information Detail

PROBLEMS THAT SCHOOLS ENCOUNTER

NSLDS data sometimes do not match the information that the school has.

Resolving Conflicting Data

- Identify conflicting data
- Identify data provider
- Contact data provider
- Contact NSLDS Customer Service Center, if necessary

Data providers are:

- ◆ For FFEL Program loans—the guaranty agency or ED's Debt Collection Service (DCS), as appropriate.
- ◆ For Direct Loans—the Direct Loan servicer or ED's DCS.
- ◆ For Perkins Loans—the school that reported the loan or ED's DCS.
- ◆ For Pell Grant payment information—the school that reported the payment.
- ◆ For overpayments—the school that reported the overpayment or ED's DCS.

Notes:



Example Problem 1

A school might know that a student who was once in default has made satisfactory arrangements with his FFEL lender to repay the loan and has made six consecutive payments, so that this loan no longer prevents the student from being eligible for Title IV aid. However, NSLDS still shows that he is in default, so the Institutional Student Information Record (ISIR) you receive for him has a comment code 132 ("Applicant in default") and/or a status code of DU* ("Defaulted, unresolved") instead of DX* ("Defaulted, six consecutive payments"). This means you can't award him Title IV aid until the matter is resolved. What do you do?

*NSLDS Status Codes are listed in Session 7 and on pages 10-2 and 10-3 of the NSLDS Quick Reference Guide.

Example Problem 2

A student files the Free Application for Federal Student Aid (FAFSA). Her Social Security number (SSN) on the FAFSA matches a record in NSLDS, but her name and date of birth (DOB) on the FAFSA don't match the NSLDS record. The ISIR you receive for the student has a comment code 138, which means the SSNs match but the name and/or DOB do not match. As a result, no NSLDS data are sent. You can't award aid to the student until the matter is resolved. What do you do?

Working With Data Providers

When users experience problems with data providers, they should contact the NSLDS Customer Service Center at 1-800-999-8219.

Notes:



Problems While Working With NSLDS Screens

If you call the Customer Service Center, be at your workstation and be prepared to provide the information below.

Problems While Working With NSLDS Screens

- Five important pieces of information to give the customer service representative:
 - type of workstation hardware and software
 - exact wording of any messages displayed on screen
 - NSLDS screen identifier
 - description of the problem
 - what you tried to do to fix the problem

Notes:





ANSWER KEY

Notes:



Example Problem 1

Here is one approach you could take:

- ◆ Make sure you have proper documentation in the student's file showing that he has made satisfactory repayment arrangements and six consecutive payments.
- ◆ Award and disburse aid according to the student's eligibility.
- ◆ Use NSLDS Borrower Tracking screens to find the data provider that reported the student's loan was in default.
- ◆ Use the NSLDS Contact screens to obtain the name, telephone number, and address of the data provider.
- ◆ Contact the person at the data provider and ask him or her to report the change directly to NSLDS.

Example Problem 2

There could be a number of reasons that the SSN, name, and DOB on the FAFSA don't match the information in NSLDS, such as:

- ◆ The student may have entered her SSN incorrectly on the FAFSA.
- ◆ A data provider may have reported another person's SSN, name, or DOB incorrectly to NSLDS.
- ◆ The Social Security Administration may have inadvertently assigned the same SSN to two people.

Here is one approach you could take:

- ◆ The school must first determine if the existing NSLDS record is the student's. If so, it must use NSLDS information to determine Title IV eligibility.
- ◆ The school should access NSLDS directly online to determine if the matched SSN in NSLDS belongs to the student. The school should compare the information it has about the student to the data contained in NSLDS.
 - For example, if the name of the student as reported on the SAR or ISIR is a nickname and the name in NSLDS is the applicant's actual name, the school should use the information in NSLDS when determining the student's Title IV eligibility.
 - Similarly, if the school has information that the student attended XYZ University during the 1995-96 award year and the

Notes:



NSLDS record shows that Title IV aid was received at XYZ University during the same award year, it might assume that the data in NSLDS belong to the student.

- ◆ In many cases, the school will need to discuss the discrepancies with the student before making its final decision.
- ◆ If the student has made a mistake in reporting SSN, name, or birth date on the FAFSA and you have the proper documentation, tell the student to send a correction to the Central Processing System. The application then will go through the NSLDS match again, which should resolve the discrepancy.
 - You don't need to wait for the results on the next ISIR to continue the awarding process, because you can use the corrected data in NSLDS.
- ◆ If you find that the student has correctly reported her SSN on the FAFSA, then a data provider may have reported another person's SSN incorrectly or the Social Security Administration may have assigned the same SSN to two people.
 - If, after reviewing NSLDS data, you determine that the data are not the student's financial aid history, you can continue the awarding process using the assumption that the student has not received any relevant Title IV aid.

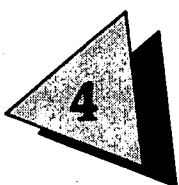
Notes:



- ◇ In this instance, while not required, it would be helpful if you would contact the data provider that submitted someone else's information to NSLDS using the applicant's SSN, explain the error, and have it corrected.
- If it turns out that the Social Security Administration has assigned the same SSN to two people, the Social Security Administration must resolve the discrepancy.

Notes:





Connecting to NSLDS

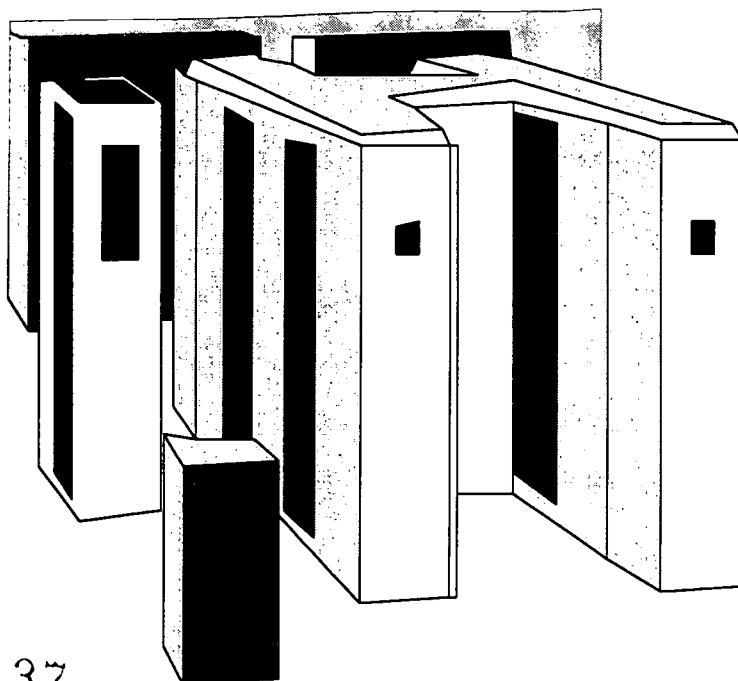
Objectives

After completing this session, you will be able to:

- ◆ determine hardware and software needs for submitting and receiving NSLDS data electronically, and
- ◆ describe the main capabilities of ED's Title IV WAN and NSLDS software.

Contents

- ◆ Title IV WAN
- ◆ Mainframe Schools
- ◆ Personal Computer (PC) Schools
- ◆ Year 2000 Compliant Systems



TITLE IV WAN

Notes:



Title IV WAN

■ Provides for the following functions:

- complete and send electronic initial applications and renewal applications
- receive electronic Institutional Student Information Records (ISIRs)
- make electronic corrections
- send and receive electronic payment information for Pell Grant recipients

Title IV WAN (cont'd)

- receive electronic Statements of Account for Pell Grant Program
- exchange data with Direct Loan Origination Center to originate, draw down, disburse, and reconcile Direct Loans
- send and receive NSLDS data
- transmit, receive, and report FISAP data

Completing the Enrollment Documents

To participate in the Title IV WAN, schools submit required forms, list a destination point contact, and indicate desired services.

Title IV WAN Enrollment Documents

- Title IV WAN Customer Initiation Document
- Letter of Application (LOA)
- Participation Agreement (PA)
- Mainframe Requirements Document

Notes:



ED-Provided Software

There are two ways schools can access the Title IV WAN:

- ◆ mainframe and/or
- ◆ personal computer (PC)

ED provides EDconnect software to enable both types of computers to connect to the Title IV WAN, access Title IV WAN mailboxes, and transmit and receive batches of financial aid information.

- ◆ The version of EDconnect supplied for PCs includes NetConnect software that allows online (interactive) access to NSLDS.

For help with mainframe or PC questions about connecting to the Title IV WAN, call Title IV WAN Customer Service at 1-800-615-1189.

MAINFRAME SCHOOLS

Schools that use mainframe computers to connect to the Title IV WAN receive the mainframe version of the EDconnect package of communications software.

- ◆ Runs on IBM or IBM-compatible mainframe with MVS operating system.

Mainframe schools can also request a mainframe version of ED's DataPrep software for Perkins Loan reporting.

- ◆ Also runs on IBM or IBM-compatible mainframe with MVS operating system.

Through a mainframe, only **batch** access to NSLDS is possible.

ED required schools to have **online** access to NSLDS as of January 1, 1998. Therefore, mainframe schools must also have at least one PC to provide online access.

- ◆ This requirement can be satisfied through a third-party servicer that provides the necessary online access to NSLDS.

PERSONAL COMPUTER (PC) SCHOOLS

Schools that use PCs to connect to the Title IV WAN receive the PC version of the EDconnect package of communications software.

- ◆ This includes NetConnect, which provides online access to NSLDS and other ED databases.
- ◆ Schools can also request a PC version of ED's DataPrep software for Perkins Loan reporting.

Notes:



The current PC version of EDconnect runs under DOS or Windows:

- ◆ MS-DOS version 6.2 or higher, configured to provide maximum conventional and extended memory, with 620 K of conventional RAM available; or
- ◆ Windows 3.1, Windows 3.11, or Windows 95.

However, the minimum configuration required by January 1999 is shown below.

PC Configuration

■ Minimum configuration by January 1999:

- IBM or fully IBM-compatible PC with at least a 200 MHz Pentium processor or compatible
- Windows 95 or Windows NT 4.x
- 64 MB of total memory
- 4.0 GB SCSI hard drive
- 3.5-inch 1.44 MB floppy disk drive

PC Configuration (cont'd)

- 56 K analog modem
- SVGA monitor
- Windows 95 keyboard
- Dedicated phone line
- Printer that prints on standard paper
- To use EDEpress Tutorial and AWARE software, 12x CD-ROM drive with sound card

Notes:



NetConnect

ED's NetConnect software is available only for personal computers. It provides interactive online access, providing the functions below.

Using NetConnect

■ Destination points can:

- access Title IV databases, such as CPS and NSLDS, depending on their authorization
- view transmission history that is updated continuously rather than every 24 hours
- see when products were shipped to them
- browse online
- access billing information
- in the case of third-party servicers, see what institutions they service

Notes:



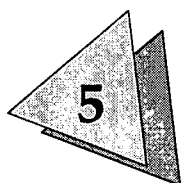
YEAR 2000 COMPLIANT SYSTEMS

ED is requiring that all computer systems schools use for processing financial aid data be "Year 2000 Compliant" by January 1, 1999. By this date, all of your school's financial aid data processing systems, procedures, and protocols must be able to store and report date information in ways that differentiate between years prior to 2000 and Year 2000 and beyond.

- ◆ This requirement also applies to any third-party servicer your school may contract with to administer Title IV programs.

For further information regarding the requirement to become "Year 2000 Compliant" see:

- ◆ Dear Colleague letter GEN-98-1
- ◆ Web page at: www.ed.gov/y2k



School and Third-Party Servicer Responsibilities

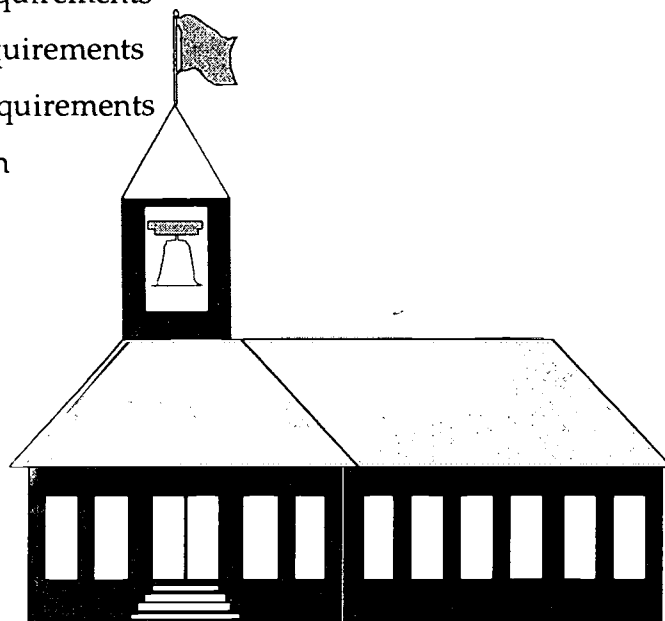
Objectives

After completing this session, you will be able to:

- ◆ describe SSCR, financial aid history, Perkins Loan, overpayment, and organization contact screen responsibilities,
- ◆ implement NSLDS security measures,
- ◆ develop procedures to assure the integrity of the data the school sends to NSLDS, and
- ◆ describe ED's electronic message process.

Contents

- ◆ Student Status Confirmation Report Requirements
- ◆ Financial Aid Transcript Requirements
- ◆ Perkins Loan Reporting Requirements
- ◆ Overpayment Reporting Requirements
- ◆ Organization Contact Screen Responsibilities
- ◆ Privacy Requirements
- ◆ Data Input and Integrity
- ◆ ED's Electronic Messages



STUDENT STATUS CONFIRMATION REPORT (SSCR) REQUIREMENTS

Schools are required to report the enrollment status of students who receive federal loans.

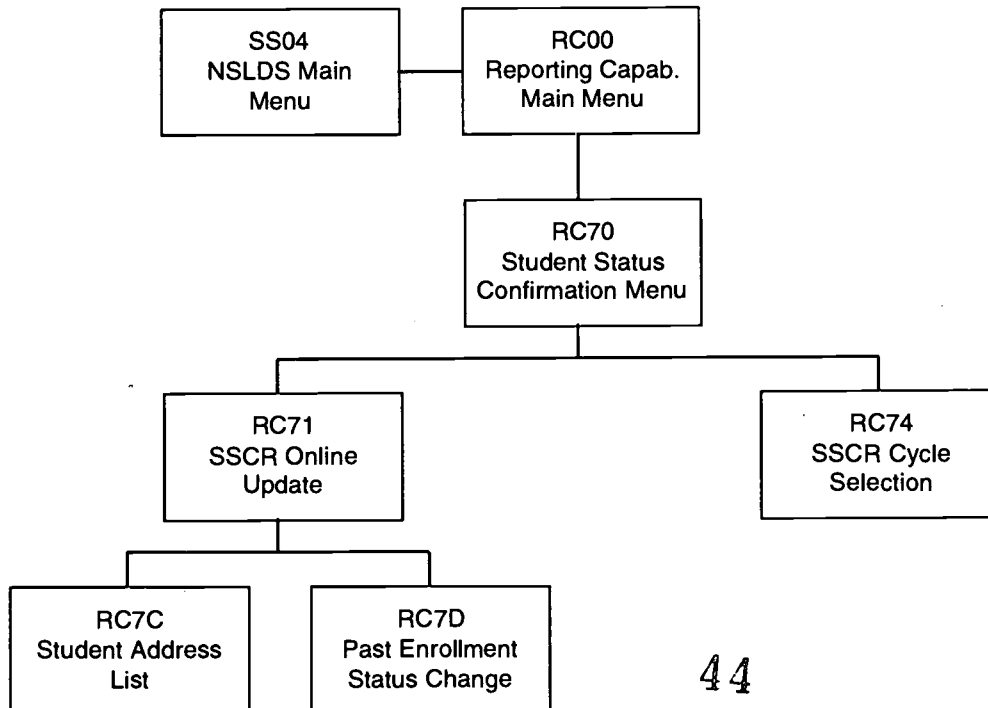
Notes:



SSCR Regulatory Requirements

- SSCR reporting is required by the Higher Education Act, as amended
- The requirements for FFEL Program loans are in 34 CFR 668.610(c)
- The requirements for Direct Loan Program loans are in 34 CFR 685.309(b)

Paths to the Main SSCR Screens Used by Schools



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Responsibilities in Submitting SSCR Roster Files

SSCR Roster File

- On receiving the SSCR Roster File, the school must:
 - match the SSCR Roster File against enrollment records
 - update each student's enrollment status and enrollment status effective date
 - propose changes to student identifiers (SSN; last name, first name, middle initial; and DOB), as needed
 - update or add student address data, as needed

SSCR Roster File (cont'd)

- add new students to the SSCR Roster File, as needed
- return the updated SSCR Roster File, which becomes the SSCR Submittal File, to NSLDS within 30 days of the date the SSCR Roster File was sent to the school
- retrieve and, if necessary, process the Error Notification File provided by NSLDS

SSCR Implementation

Most schools have now received the Successful Completion letter shown on the next page. ED will:

- ♦ assist schools that have shown evidence of complying with required SSCR processing through NSLDS
- ♦ take enforcement action against schools not attempting to comply

Notes:



SUCCESSFUL COMPLETION LETTER

Financial Aid Director
College XYZ
Newtown, PA 12223

Dear Financial Aid Director:

I am pleased to inform you that your school has successfully completed an NSLDS electronic SSCR cycle. You have received, completed, and returned an SSCR file and have properly processed its corresponding error report. Thank you very much for your efforts. The Department appreciates your help in moving forward with this new and important initiative.

Because of your success with the initial roster, effective immediately you are exempt from processing SSCRs generated and sent to you by guaranty agencies. All guaranty agencies have received a list of those schools that are exempt, but you should keep a copy of this letter in the event questions arise.

You will now begin to receive SSCRs from the NSLDS according to your individual processing schedule. That schedule is available to you via on-line SSCR screens in NSLDS. If you have not set your schedule, one has been set for you. Please review your schedule and modify it as necessary according to your school's calendar or workload.¹

All SSCR rosters must be returned to NSLDS within 30 days of receipt and responses to error files must be submitted within 10 days.

If you have any questions concerning the SSCR process, please feel free to call our Customer Service Center at (800) 999-8219.

Sincerely,

F. Lynn Alexander, Director
National Student Loan Data System
U.S. Department of Education

¹Because different schools have different academic calendars, NSLDS's SSCR process lets you determine how your school can best meet its reporting requirements. You may choose up to six cycles each year, **the more the better**. When establishing your schedule, please comply with the following: regular term-based schools (semester, quarter, or trimester) must complete at least one SSCR cycle each term; a summer session does not count as a term; schools that do not use regular terms must complete at least two SSCR cycles each year at dates they choose, but at least four months apart; all reporting cycles must be at least sixty days apart.

Overdue SSCRs

ED is monitoring schools to ensure that SSCRs are being returned to NSLDS within the required 30-day time frame. If schools do not return SSCRs within this time frame, they are sent overdue letters.

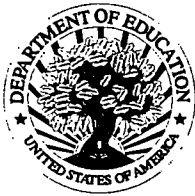
Overdue Letters

- First Overdue Letter — School has not returned the SSCR within 30 days
- Second Overdue Letter — School is more than 18 days past the 30-day deadline
- Third Overdue Letter — School is more than 28 days past the 30-day deadline

Sample letters are shown on the next three pages.

Notes:





UNITED STATES DEPARTMENT OF EDUCATION
National Student Loan Data System
600 Independence Avenue, SW
Regional Office Building 3, Room 4520, M/S 5384
Washington, D.C. 20202-5384

MM/DD/YY

OPE ID:

FINANCIAL AID ADMINISTRATOR
STATE UNIVERSITY
US CITY, AA 99999

OVERDUE LETTER #1

Dear Financial Aid Administrator:

This letter is notification that your MM-DD-YYYY Student Status Confirmation Report (SSCR) file has not been returned by your school to the National Student Loan Data System (NSLDS). As you know, timely submission of SSCR data is necessary in order to provide for the protection of student borrowers under the federal loan programs as well as to ensure the fiscal integrity of the programs. It is extremely important that all SSCR files sent to your institution be returned to the NSLDS within 30 days of receipt. Unless you have already done so within the past ten days, please submit your completed SSCR immediately.

If you have experienced transmission or other technical programs with the SSCR, please contact the NSLDS Customer Service Center at (800) 999-8219. We look forward to receiving your SSCR within the next few days and thank you for your cooperation in this important effort.

Sincerely,

F. Lynn Alexander, Director
National Student Loan Data System
U.S. Department of Education

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**UNITED STATES DEPARTMENT OF EDUCATION****National Student Loan Data System**

600 Independence Avenue, SW

Regional Office Building 3, Room 4520, M/S 5384

Washington, D.C. 20202-5384

MM/DD/YY

OPE ID:

PRESIDENT
STATE UNIVERSITY
US CITY, AA 99999

OVERDUE LETTER #2

Dear President:

This letter alerts you that the Student Status Confirmation Report (SSCR) file that was sent to your school on MM-DD-YYYY by the National Student Loan Data System (NSLDS) has not yet been processed and returned to the NSLDS. The SSCR process requires timely submission of data in order to protect rights of student borrowers under Federal student loan programs as well as to ensure the fiscal integrity of the programs. It is extremely important that all SSCR files sent to your institution be returned to the NSLDS within 30 days of receipt. This is the second reminder we have sent. (The first reminder was sent to your school's Financial Aid Administrator and Registrar.)

Please be aware that not processing SSCR files in a timely way could result in your institution's being subject to one or more of a series of adverse actions that the Department of Education may take under its statutory and regulatory authority. Please submit your complete SSCR immediately. This alert is also being sent to your President and Registrar.

If you have experienced transmission or other technical problems with the SSCR, please contact the NSLDS Customer Service Center at (800) 999-8219. We look forward to receiving your SSCR within the next few days and thank you for your cooperation in this important matter.

Sincerely,

F. Lynn Alexander, Director
National Student Loan Data System
U.S. Department of Education

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UNITED STATES DEPARTMENT OF EDUCATION

National Student Loan Data System

600 Independence Avenue, SW
Regional Office Building 3, Room 4520, M/S 5384
Washington, D.C. 20202-5384

MM/DD/YY

OPE ID:

PRESIDENT
STATE UNIVERSITY
US CITY, AA 99999

OVERDUE LETTER #3

Dear President:

Approximately one week ago, I sent you a letter informing you that the Student Status Confirmation Report (SSCR) file that was sent to your school on MM-DD-YYYY by the National Student Loan Data System (NSLDS) has not been processed by your school and returned to the NSLDS. That letter was the second reminder sent to your school and it informed you that the Department of Education may take one or more adverse actions against your school if the SSCR was not promptly submitted. This letter is a final warning that if the most recent SSCR is not returned within ten days of the date of this letter, I will refer the matter to the Department's Administrative Actions and Appeals Division for immediate action as provided under regulations at 34 CFR 668, subpart G. Such actions could include the imposition of a fine or the initiation of a Limitation, Suspension, or Termination action that could remove your school from participation in all Title IV programs.

I regret that we have found it necessary to take such action but, as stated in the earlier letters, the importance of compliance with the requirements for submission of SSCR data cannot be minimized. A copy of this notice is also being sent to your Financial Aid Administrator.

If you have experienced transmission or other technical problems with the SSCR, please contact the NSLDS Customer Service Center at (800) 999-8219.

Sincerely,

F. Lynn Alexander, Director
National Student Loan Data System
U.S. Department of Education

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Equal Responsibility

- Schools and third-party servicers are equally responsible and severally liable if regulatory requirements are not met — 34 CFR 668.25(c)(3)
- Schools and third-party servicers could both be subject to administrative actions



Notes:



FINANCIAL AID TRANSCRIPT REQUIREMENTS

Schools are required to obtain information about students who previously attended other schools. This allows schools to determine student eligibility for Title IV assistance. Instead of requesting paper FATs, schools may use information from NSLDS:

- ◆ online, from the FAT screens
- ◆ from batch NSLDS FATs
- ◆ on the Student Aid Report (SAR)
- ◆ on the NSLDS Financial Aid History page of the Institutional Student Information Record (ISIR)

School Liability When Using NSLDS

If the school had access at the time it initially reviewed NSLDS data to conflicting information that showed a lack of, or reduced, eligibility of the student, then it is liable.

Once a school becomes aware, through NSLDS or any other means, that a student is not eligible and/or was not eligible for Title IV aid previously disbursed, it must:

- ◆ not disburse or deliver additional funds
- ◆ assist ED or the lender in requiring the student to make arrangements to repay any funds the student was not eligible to receive

Notes:



PERKINS LOAN REPORTING REQUIREMENTS

Schools have monthly and/or quarterly Perkins Loan reporting requirements, as described in Session 2.

OVERPAYMENT REPORTING REQUIREMENTS

Under an Action Letter planned to be issued in July 1998, schools have both initial entry and ongoing overpayment reporting requirements, as described in Session 2.

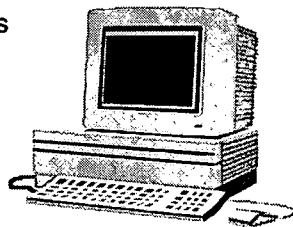
ORGANIZATION CONTACT SCREEN RESPONSIBILITIES

Schools, guaranty agencies, and lenders are responsible for maintaining their own *Organization Contact Information* screens in NSLDS. Sample screens were shown in Session 3.

PRIVACY REQUIREMENTS

Security Standards

- Personnel
- Computer facilities
- Media (magnetic and print)



Notes:



NSLDS contains highly confidential information, and your school must protect the privacy of the data by using security measures.

◆ Personnel Security

- Individual users are personally liable for unauthorized disclosure of NSLDS data.
- All users must sign the Notice of Criminal Liability under the Privacy Act (see next page).

◆ Computer Facilities

- Locate computer terminal so personnel who are not authorized cannot view NSLDS screens.
- Don't leave computers unattended during online use.

◆ Magnetic Media and Printed Materials

- Clearly mark computer tapes, diskettes, and printed materials as containing information protected under the Privacy Act.
- Emphasize penalties for unauthorized disclosure of NSLDS data.
- Store in a secure place.

Notes:



Notice of Criminal Liability under the Privacy Act

The information provided to me by the Department of Education is protected by the Privacy Act of 1974, as amended. The protection of this information, once entrusted to me, becomes my responsibility. Therefore, I agree to protect the privacy of all information that has been provided to me as an agent of the Department. I understand that the criminal penalties identified below may be enforced if I violate the requirements of the Privacy Act.

5 U.S.C. 552a, as amended,

(i)(1) Any officer or employee of an agency, who by virtue of his employment or official position, has possession of, or access to, agency records which contain individually identifiable information the disclosure of which is prohibited by this section or by rules or regulations established thereunder, and who knowing that disclosure of the specific material is so prohibited, willfully discloses the material in any manner to any person or agency not entitled to receive it, shall be guilty of a misdemeanor and fined not more than \$5,000.

(2) Any officer or employee of any agency, who willfully maintains a system of records without meeting the notice requirements of subsection (e) (4) of this section shall be guilty of a misdemeanor and fined not more than \$5,000.

(3) Any person who knowingly and willfully requests or obtains any records concerning an individual from an agency under false pretenses shall be guilty of a misdemeanor and fined not more than \$5,000.

I certify that I have read and understood the criminal penalties of the Privacy Act, as stated above, and that I agree to comply with the government's requirements for the protection of any information covered by the Privacy Act.

Name and Date: _____

Typed Name: _____

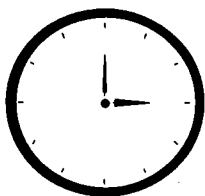
DATA INPUT AND INTEGRITY

Schools as Data Providers

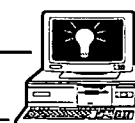
- Collect necessary information
- Code and test software necessary to format and produce database extract files
- Perform data verification edits
- Submit new and changed records
- Correct any data errors
- Transmit data using Title IV WAN

Data Input and Integrity

- Schools must submit data that are:
 - Complete
 - Accurate
 - Timely



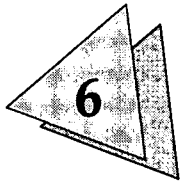
Notes:



ED'S ELECTRONIC MESSAGES

ED transmits updates, announcements, and other important information to schools' Title IV WAN mailboxes.

- ◆ Schools must be able to access these important messages.



Software Setup

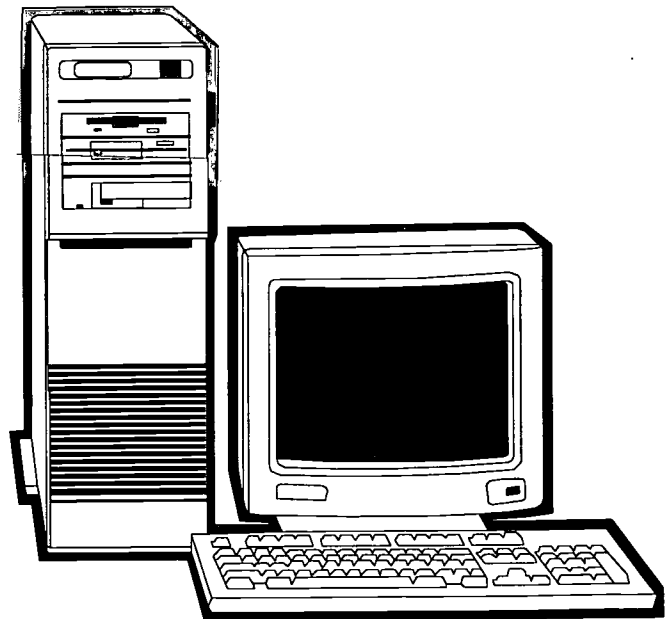
Objectives

After completing this session, you will be able to:

- ♦ dial up and log on to access the National Student Loan Data System, and
- ♦ navigate through NSLDS screens.

Contents

- ♦ Connecting to the Title IV Wide Area Network and NSLDS
- ♦ General NSLDS Screen Navigation



CONNECTING TO THE TITLE IV WIDE AREA NETWORK AND NSLDS

EDconnect is the telecommunications software used to send and receive data via the Title IV WAN. NetConnect is the dial-up software used to access online functions.

Destination Points

Each location that physically transmits and receives financial aid data via the Title IV WAN is called a "destination point" and must have a Title IV WAN User ID. A school can designate itself as a destination point, or it may designate a third-party servicer (or servicers) to be its destination point(s).

A school may have multiple destination points. For example, the Financial Aid Office, Business Office, and Registrar's Office may be different destination points.

NSLDS User Identification

Your school must have a Title IV WAN ID in order to apply for an NSLDS User ID.

To obtain an NSLDS User ID, you must:

- ❖ complete a Letter of Application
- ❖ sign the statement of "Notice of Criminal Liability under the Privacy Act"

Notes:



Passwords

Passwords should NEVER be:

- ◆ revealed to other people
- ◆ written down
- ◆ included as a part of an automatic logon sequence on any PC-based or memory-equipped terminal or system

When you log on for the first time, your initial NSLDS password expires. The system will prompt you to change your password.

- ◆ Your NSLDS password expires every 30 days. You will be prompted to change your password.
- ◆ If you do not log on for 120 days, your NSLDS access is revoked. You must call the NSLDS Customer Service Center to reactivate your access.

Notes:



GENERAL NSLDS SCREEN NAVIGATION

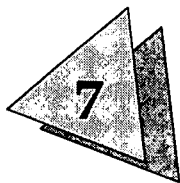
Page 1-3 of NSLDS's *Quick Reference Guide* shows a sample screen with many typical features, such as:

- ◆ **More Data Indicator** (at the right side of the screen)—there is a field called MORE that may contain "+" and/or "-" signs or be empty.
 - If there is a "+" sign, press **F8** to see more information.
 - If there is a "-" sign, press **F7** to go back to the previous screen.
 - If the MORE field is empty, the screen is showing all the available information.
- ◆ **Action Bar** (at the top of the screen)—tells available actions you can take. Action bars vary among screens.
- ◆ **Field Indicator**—If a field ends in a period, you may enter data. If it ends in a colon, the system automatically completes the data field.
- ◆ **System Message** (at the bottom of the screen)—provides an error message or other information.

Page 1-4 of NSLDS's *Quick Reference Guide* provides a list of the NSLDS function keys and other frequently used keys.

Notes:





Student Eligibility

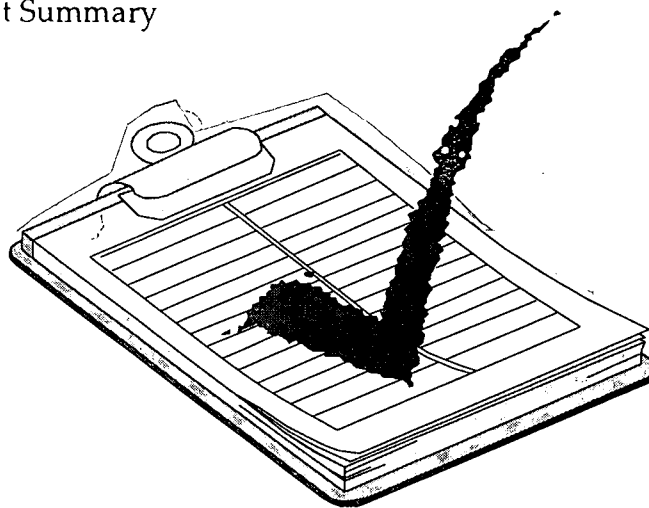
Objectives

After completing this session, you will be able to:

- ♦ describe the processes used to determine student eligibility, and
- ♦ navigate through Financial Aid Transcript Summary and Aid Overpayment screens.

Contents

- ♦ Prescreening
- ♦ Postscreening
- ♦ Financial Aid Transcript Summary
- ♦ Aid Overpayment
- ♦ Case Studies



PRESCREENING

Prescreening identifies students who have:

- ◆ defaults on Title IV loans;
- ◆ overpayments on Pell Grants, Federal Supplemental Educational Opportunity Grants (FSEOGs), and Federal Perkins Loans; AND/OR
- ◆ approached loan eligibility for a single year.

Prescreening is not an online function. Schools perform prescreening by reviewing NSLDS data on applicants' ISIRs.

POSTSCREENING

Beginning with the 1998-99 award year, ED implemented a new postscreening process.

- ◆ This is not an online function.
- ◆ This process allows ED to help schools identify any student whose eligibility has changed since the last SAR/ISIR was produced.

Postscrening tells you that a student:

- ◆ entered default on a Title IV loan that was previously not in default;
- ◆ cleared a previously reported default on a Title IV loan;
- ◆ owed a new overpayment on a Title IV grant or loan; or
- ◆ cleared a previously reported overpayment on a Title IV grant or loan.

When these situations occur, NSLDS sends the Central Processing System (CPS) a file identifying the affected applicants.

Notes:



- ◆ The CPS automatically creates a new transaction for these applicants.
- ◆ The applicant's record goes through the prescreening process again and the CPS receives the current data regarding the student's financial aid history.

For all changes identified in the post-screening process, the CPS will generate a new SAR/ISIR transaction that includes, as part of the NSLDS Financial Aid History section, the changed information.

- ◆ These transactions include a system generated flag of "N" (for NSLDS) and a special SAR/ISIR comment (Comment #004) that informs the student and the school that a change in NSLDS is being reported that may affect the student's eligibility for Title IV aid.

FINANCIAL AID TRANSCRIPT SUMMARY

The Financial Aid Transcript (FAT) Summary function lets you review historical information online to determine student eligibility before disbursing financial aid.

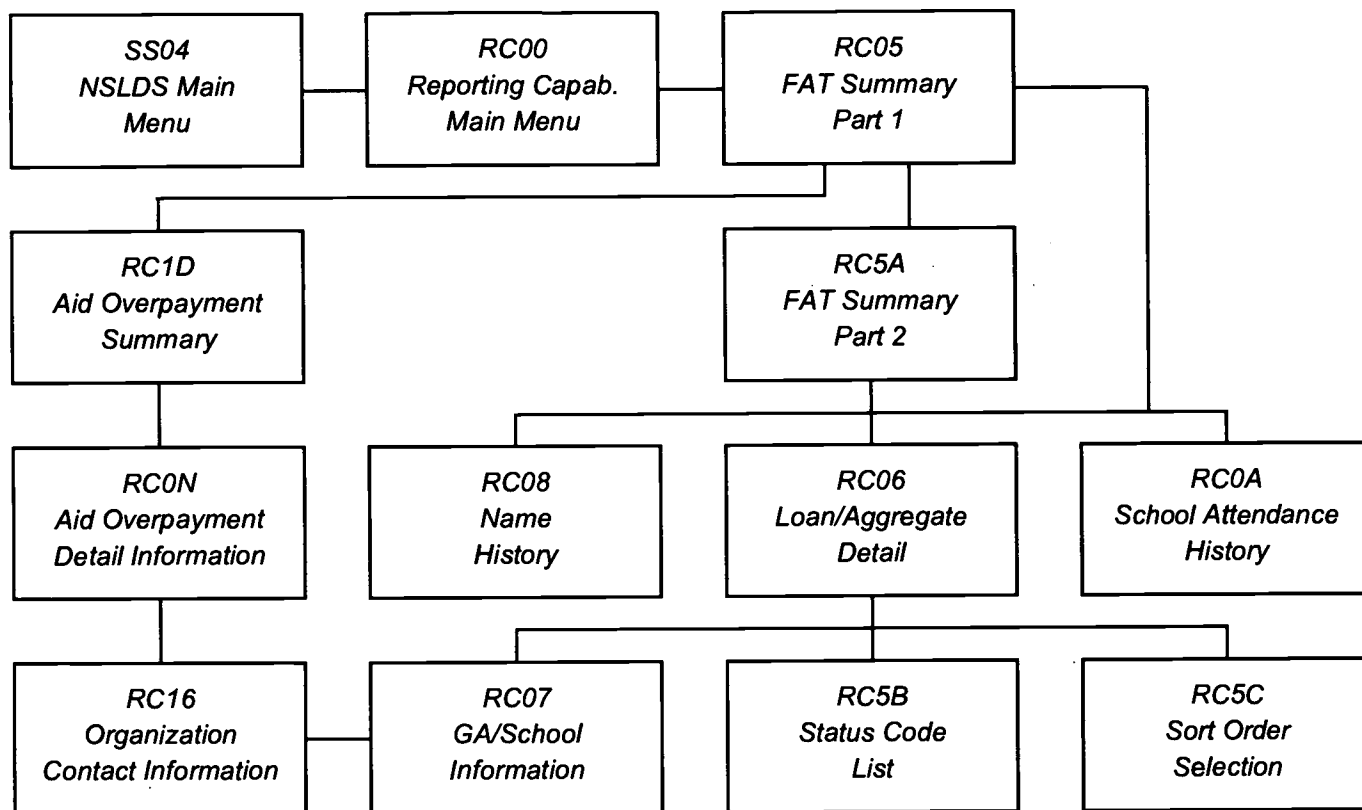
The financial aid transcript screens are **view only**; you can't change the information online.

Online Screen Navigation

The next page shows a "map" of the screens included in NSLDS's Financial Aid Transcript Summary function. Please pull out this page for reference during the rest of the session.

Notes:





Map of NSLDS's Financial Aid Transcript Summary Function

Financial Aid Transcript Summary Part 1

Here's how you access the *RC05 Financial Aid Transcript Summary Part 1* screen:

Step 1: At the *SS04 NSLDS Main Menu* screen, type **2** (*Reporting Capabilities Main Menu*) and press **ENTER**.

Step 2: At the *RC00 Reporting Capabilities Main Menu* screen, type **5** (*Financial Aid Transcript Summary*) and press **ENTER**.

This will bring you to the *RC05 Financial Aid Transcript Summary Part 1* screen.

Notes:



SS04

NSLDS 03-02-1998
NSLDS Main Menu 12:15:47

Input the number of your choice and press ENTER.

- ☒ 1. System Support Main Menu
2. Reporting Capabilities Main Menu

RC00

NSLDS 03-02-1998
Reporting Capabilities Main Menu 12:15:48

F3=

Input the number of your choice and press ENTER.

- ☒ 1. Aggregate Inquiry Main Menu
2. Default Rate Main Menu
3. Report Selection Menu
4. Borrower Tracking Security
5. Financial Aid Transcript Summary

RC05 _ FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
Financial Aid Transcript Summary Part 1 12:15:49

SSN.._____ First Name.._____ DOB...-_-____ Schl Yr..1998
Curr SSN: Last Name: Name Hist: N
For Overpayment Summary Info make a selection (S) and press ENTER
Sel Overpayment Contact Defaulted Loans.... Discharged.....:
Pell....: Loan Sat. Repayment: Active Bankruptcy:
FSEOG...:
Perkins.. Perkins Cumulative Loan Amount...:

For Aggregate Detail make a selection (S) and press ENTER
Aggregate Amount for FFELP/Direct Loans

Subsidized Loans		
Outstanding Prin. Bal.:	Pending Disb.:	Total:
Unsubsidized Loans		
Outstanding Prin. Bal.:	Pending Disb.:	Total:
Consolidated Loans		
Outstanding Prin. Bal.:		Total:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT

Navigation Schematic for RC05 Financial Aid Transcript Summary Part 1

The *RC05 Financial Aid Transcript Summary Part 1* screen is not yet populated with data. The cursor automatically moves to the SSN field. To populate the screen, do the following:

- Step 1: Type the student's **SSN**. As an example, use **043 90 6703**. The cursor automatically advances to the First Name prompt.
- Step 2: Type the student's **first name**. As an example, use **Tara Marie**.
- Step 3: Press **TAB** to advance to the next prompt, Date of Birth (DOB). Type the student's **DOB** in MM-DD-CCYY format. As an example, use **02-16-1975**. Do *not* type the hyphens—they are already there. The cursor automatically advances to the next prompt, School Year (Schl Yr).
- Step 4: The **School Year** field is prepopulated with the current year. Press **ENTER** to populate the screen with the student's information.

Notes:



RC05 — FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
 Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
 Financial Aid Transcript Summary Part 1 12:15:50

SSN..043906703 First Name..TARA MARIE__ DOB..02-16-1975 Schl Yr..1998
 Curr SSN: 043906703 Last Name: NUNEZ Name Hist: Y
 For Overpayment Summary Info make a selection (S) and press ENTER
 Sel Overpayment Contact Defaulted Loans.....: N Discharged.....: N
 Pell.....: N N/A Loan Sat. Repayment: N Active Bankruptcy: N
 FSEOG....: N N/A
 Perkins.: N N/A Perkins Cumulative Loan Amount...: \$4,500

For Aggregate Detail make a selection (S) and press ENTER

Aggregate Amount for FFELP/Direct Loans

— Subsidized Loans
 Outstanding Prin. Bal.: \$14,375 Pending Disb: \$ N/A Total: \$14,375
 Unsubsidized Loans
 Outstanding Prin. Bal.: \$ N/A Pending Disb: \$ N/A Total: \$ N/A
 Consolidated Loans
 Outstanding Prin. Bal.: \$ N/A Total: \$ N/A

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT

RC05 Financial Aid Transcript Summary Part 1 (Populated)

The screen is now populated with the following information from the NSLDS database:

- ◆ Overpayment indicators for Pell, FSEOG, and Perkins —Y, N, or S, where S means satisfactory arrangement made—with contact information if applicable
- ◆ Defaulted Loans indicator (Y or N)
- ◆ Discharged Loans indicator (Y or N)
- ◆ Loan Satisfactory Repayment indicator (Y or N)
- ◆ Active Bankruptcy indicator (Y or N)
- ◆ Perkins Cumulative Loan Amount

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- ◆ Aggregate Loan Amounts for subsidized, unsubsidized, and consolidated loans



Notes:

When the screen is populated, the prompt automatically advances to the **action bar** at the top of the screen. Entering an **action code** on the action bar will take you to another screen. On this screen, the following action codes are shown:

P2 takes you to the *RC5A Financial Aid Transcript Summary Part 2* screen.

LD takes you to the *RC06 Loan Detail* screen.

AD takes you to the *RC06 Aggregate Detail* screen.

OS takes you to the *RC1D Aid Overpayment Summary* screen.

NH takes you to the *RC08 Name History* screen.

AH takes you to the *RC0A School Attendance History* screen.

Financial Aid Transcript Summary Part 2

To access the *RC5A Financial Aid Transcript Summary Part 2* screen from the populated *RC05 Financial Aid Transcript Summary Part 1* screen:

Step 1: Type **P2** on the action bar.

Step 2: Press **ENTER**.

RC05 **P2** FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
 Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
 Financial Aid Transcript Summary Part 1 12:15:51

SSN Cur For Sel RC5A — Loan Detail(LD) Name History(NH) Attendance History(AH)

NSLDS 03-02-1998
 Financial Aid Transcript Summary Part 2 12:15:52

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Schl Yr...: 1998
 Curr SSN: 043906703 Last Name.: NUNEZ Name Hist: Y

Perkins Loans

Cumulative Loan Amount.....: \$4,500 Current Year Loan Amount: \$ N/A
 First Disb. Prior to 10-01-1992: N Expanded Lending Option.: N

1997-98 Pell Payment Data MORE:

School Code:	School Name:	
Tran.....:	Sch. Amt....:	Disb. Amt.:
Rem. Amt.:	% Sch. Used:	As of.....:

School Code:	School Name:	
Tran.....:	Sch. Amt....:	Disb. Amt.:
Rem. Amt.:	% Sch. Used:	As of.....:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

Navigation Schematic for RC5A Financial Aid Transcript Summary Part 2

The system populates this screen with the following student information:

- ◆ Perkins Loan cumulative loan amount
- ◆ Perkins Loan current school year loan amount
- ◆ First disbursement prior to 10/1/92 (Y or N)
- ◆ Expanded Lending Option (Y or N)
- ◆ Pell Payment Data (maximum of two records)

You can navigate to the *Loan Detail (LD)*, *Name History (NH)*, and *Attendance History (AH)* screens by entering the appropriate action code on the action bar at the top of the screen. (You can also navigate to those screens from the *RC05 Financial Aid Transcript Summary Part 1* screen.)

Loan Detail

To view detailed information on the student's Perkins Loans, Federal Family Education Loans, and Direct Loans:

Step 1: Type **LD** on the action bar.

Step 2: Press **ENTER**.

Notes:



RC05 ☐ LD FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
 Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
 Financial Aid Transcript Summary Part 1 12:15:53

SSN Cur For Sel RC06 GA/School Information(GS)

NSLDS 03-02-1998
 Loan Detail By Loan Begin Date, Outstanding Bal. (Descending) 12:15:54

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y
 Curr SSN: 043906703 Last Name.: NUNEZ MORE: +

Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact-- Code	Type
- FFEL STAFFORD SUB	\$ 5,500	09-03-1996	05-22-1997	733	00258900	700204	LNS
Status Cd ID as of	09-03-1996	Outst Bal.	\$ 2,750 as of	08-13-1996	Acad Lvl:	3	
- FFEL STAFFORD SUB	\$ 5,500	08-29-1995	05-16-1996	733	00258900	827288	LEN
Status Cd ID as of	08-29-1995	Outst Bal.	\$ 5,500 as of	09-30-1995	Acad Lvl:	3	
- FFEL STAFFORD SUB	\$ 1,750	01-18-1995	05-18-1995	733	00258900	700043	LNS
Status Cd ID as of	01-18-1995	Outst Bal.	\$ 1,750 as of	06-30-1996	Acad Lvl:	2	
- FFEL STAFFORD SUB	\$ 1,750	09-05-1994	05-13-1995	733	00257200	700043	LNS
Status Cd ID as of	09-05-1994	Outst Bal.	\$ 1,750 as of	06-30-1996	Acad Lvl:	2	

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER

Navigation Schematic for RC06 Loan Detail

The RC06 Loan Detail screen has the following information:

- ◆ types of loans,
- ◆ loan amount,
- ◆ loan begin and end dates,
- ◆ guaranty agency and school codes,
- ◆ contact code and type,
- ◆ status code,
- ◆ outstanding principal balance, and
- ◆ academic level for loan period.

The contact codes are as follows:

- ◆ SCH—school
- ◆ LEN—lender
- ◆ LNS—lender's servicer
- ◆ DLS—Direct Loan Servicer
- ◆ EDR—ED region
- ◆ GA—guaranty agency
- ◆ SCS—school servicer
- ◆ N/A—not applicable

Notes:



There is a "+" sign in the MORE field, so press F8 to view more loan information.

```

RC06      _  GA/School Information(GS)
-----
                                NSLDS                                03-02-1998
                                Loan Detail By Loan Begin Date, Outstanding Bal. (Descending) 12:15:55
SSN.....: 043906703  First Name: TARA MARIE  DOB: 02-16-1975  Name Hist: Y
Curr SSN: 043906703  Last Name.: NUNEZ                                MORE: -

Loan Detail          Loan      Loan      Loan      GA      School      --Contact---
                    Amount     Begin     End       Code     Code       Code      Type
-----
- FFEL STAFFORD SUB  $ 2,625  09-07-1993  05-14-1994  733  00257200  700043  LNS
  Status Cd ID as of 09-07-1993  Outst Bal. $ 2,625 as of 06-30-1996  Acad Lvl: 1
- FEDERAL PERKINS    $ 4,500  07-01-1993  06-30-1995  N/A  00257200  00257200 SCH
  Status Cd DA as of 01-18-1995  Outst Bal. $ 4,500 as of 09-01-1994  Acad Lvl: N

  Status Cd    as of                Outst Bal.          as of                Acad Lvl:
  Status Cd    as of                Outst Bal.          as of                Acad Lvl:

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F9=STATUS CODE LIST  F10=SELECT SORT ORDER
  
```

RC06 Loan Detail (cont'd)

From the *RC06 Loan Detail* screen, you can access the status code list and select the information sort order. Press F9 to view the first screen of status codes. Press F8 to see the remaining codes.

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RC5B

NSLDS
Status Code List

03-02-1998
12:15:56

MORE: +

Status

Code

Description

AE	ASSIGNED TO U.S. DEPARTMENT OF EDUCATION
BC	BANKRUPTCY CLAIM, DISCHARGED
BK	BANKRUPTCY CLAIM, ACTIVE
CA	CANCELLED
DA	DEFERRED
DB	DEFAULTED, THEN BANKRUPT, ACTIVE, CHAPTER 13
DC	DEFAULTED, COMPROMISE
DD	DEFAULTED, THEN DIED
DE	DEATH
DI	DISABILITY
DK	DEFAULTED, THEN BANKRUPT, DISCHARGED, CHAPTER 13
DL	DEFAULTED, IN LITIGATION
DO	DEFAULTED, THEN BANKRUPT, ACTIVE, OTHER
DP	DEFAULTED, PAID IN FULL

F3=EXIT F7=BACKWARD F8=FORWARD

RC5B Status Code List (1 of 2)

RC5B

NSLDS
Status Code List

03-02-1998
12:15:57

MORE: -

Status

Code

Description

DS	DEFAULTED, THEN DISABLED
DT	DEFAULTED, COLLECTION TERMINATED
DU	DEFAULTED, UNRESOLVED
DW	DEFAULTED, WRITE-OFF
DX	DEFAULTED, SIX CONSECUTIVE PAYMENTS
FB	FORBEARANCE
ID	IN SCHOOL OR GRACE PERIOD
OD	DEFAULTED, THEN BANKRUPT, DISCHARGED, OTHER
PC	PAID IN FULL THROUGH CONSOLIDATION LOAN
PF	PAID IN FULL
RF	REFINANCED
RP	IN REPAYMENT
UI	UNREINSURED

F3=EXIT F7=BACKWARD F8=FORWARD

RC5B Status Code List (2 of 2)

Press **F3** to return to the populated *RC06 Loan Detail* screen. Now press **F10** to view the *RC5C Sort Order Selection* screen.

Notes:



```

RC5C
-----
                                NSLDS                                03-02-1998
                                Sort Order Selection                  12:15:58

Make a selection (S) and press ENTER

Sel  Sort Order

-   By Contact
-   By Defaulted/Non-Defaulted
-   By Loan Begin Date, Outstanding Bal. (Descending)
-   By Loan Type
-   By Outstanding Bal. (Descending)
-   By Status Code

F3=EXIT
  
```

RC5C Sort Order Selection

To change the order in which the loans are listed on the *RC06 Loan Detail* screen, use the *RC5C Sort Order Selection* screen as follows:

Step 1: **TAB** to the desired sort order.

Step 2: Type **S** next to the desired sort order.
As an example, select "By Outstanding Bal. (Descending)."

Step 3: Press **ENTER**.
The *RC06 Loan Detail* screen will display the loans sorted in the order you selected.

Step 4: There is a "+" sign in the **MORE** field, so press **F8** to see the next screen.

RC06 — GA/School Information(GS)

NSLDS

03-02-1998

Loan Detail By Outstanding Bal. (Descending)

12:15:59

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y

Curr SSN: 043906703 Last Name.: NUNEZ

MORE: +

Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact---	Type
- FFEL STAFFORD SUB	\$ 5,500	08-29-1995	05-16-1996	733	00258900	827288	LEN
Status Cd ID as of 08-29-1995 Outst Bal. \$ 5,500 as of 09-30-1995 Acad Lvl: 3							
- FEDERAL PERKINS	\$ 4,500	07-01-1993	06-30-1995	N/A	00257200	00257200	SCH
Status Cd DA as of 01-18-1995 Outst Bal. \$ 4,500 as of 09-01-1994 Acad Lvl: N							
- FFEL STAFFORD SUB	\$ 5,500	09-03-1996	05-22-1997	733	00258900	700204	LNS
Status Cd ID as of 09-03-1996 Outst Bal. \$ 2,750 as of 08-13-1996 Acad Lvl: 3							
- FFEL STAFFORD SUB	\$ 2,625	09-07-1993	05-14-1994	733	00257200	700043	LNS
Status Cd ID as of 09-07-1993 Outst Bal. \$ 2,625 as of 06-30-1996 Acad Lvl: 1							

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER

RC06 Loan Detail—Sorted by Outstanding Balance (Descending)—1 of 2

RC06 — GA/School Information(GS)

NSLDS

03-02-1998

Loan Detail By Outstanding Bal. (Descending)

12:16:00

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y

Curr SSN: 043906703 Last Name.: NUNEZ

MORE: -

Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact---	Type
- FFEL STAFFORD SUB	\$ 1,750	01-18-1995	05-18-1995	733	00258900	700043	LNS
Status Cd ID as of 01-18-1995 Outst Bal. \$ 1,750 as of 06-30-1996 Acad Lvl: 2							
- FFEL STAFFORD SUB	\$ 1,750	09-05-1994	05-13-1995	733	00257200	700043	LNS
Status Cd ID as of 09-05-1994 Outst Bal. \$ 1,750 as of 06-30-1996 Acad Lvl: 2							
Status Cd	as of	Outst Bal.	as of			Acad Lvl:	
Status Cd	as of	Outst Bal.	as of			Acad Lvl:	

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER

RC06 Loan Detail—Sorted by Outstanding Balance (Descending)—2 of 2

Aggregate Detail

To view the aggregate detail for a specific loan type:

- Step 1: Press **F3** once or twice as necessary to return the *RC05 Financial Aid Transcript Summary Part 1* screen.
- Step 2: Type **AD** on the action bar of the *RC05 Financial Aid Transcript Summary Part 1* screen.
- Step 3: Click with your mouse on the selection bar next to the desired loan type in the Aggregate Detail section of the screen, and type **S**. As an example, select "Subsidized Loans."
- Step 4: Press **ENTER**. This brings you to the *RC06 Aggregate Detail* screen, which displays the loans that make up the aggregate loan amount.

Notes:



RC05 ☐ AD FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
 Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
 Financial Aid Transcript Summary Part 1 12:16:01

SSN..043906703 First Name..TARA MARIE__ DOB..02-16-1975 Schl Yr..1998
 Curr SSN: 043906703 Last Name: NUNEZ Name Hist: Y
 For Overpayment Summary Info make a selection (S) and press ENTER
 Sel Overpayment Contact Defaulted Loans..... N Discharged..... N
 Pell..... N N/A Loan Sat. Repayment: N Active Bankruptcy: N
 FSEOG.... N N/A
 Perkins.. N N/A Perkins Cumulative Loan Amount... \$4,500

For Aggregate Detail make a selection (S) and press ENTER

Aggregate Amount for FFELP/Direct Loans

☒ S Subsidized Loans

Outstanding Prin. Bal.: \$14,375 Pending Disb: \$ N/A Total: \$14,375

RC06 __ GA/School Information(GS)

NSLDS 03-02-1998
 Aggregate Detail By Loan Begin Date, Outstanding Bal. (Descending) 12:16:01

F3= SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y
 Curr SSN: 043906703 Last Name.: NUNEZ MORE: +

Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact-- Code	Type
_ FFEL STAFFORD SUB	\$ 5,500	09-03-1996	05-22-1997	733	00258900	700204	LNS
Status Cd ID as of	09-03-1996	Outst Bal.	\$ 2,750 as of	08-13-1996	Acad Lvl:	3	
_ FFEL STAFFORD SUB	\$ 5,500	08-29-1995	05-16-1996	733	00258900	827288	LEN
Status Cd ID as of	08-29-1995	Outst Bal.	\$ 5,500 as of	09-30-1995	Acad Lvl:	3	
_ FFEL STAFFORD SUB	\$ 1,750	01-18-1995	05-18-1995	733	00258900	700043	LNS
Status Cd ID as of	01-18-1995	Outst Bal.	\$ 1,750 as of	06-30-1996	Acad Lvl:	2	
_ FFEL STAFFORD SUB	\$ 1,750	09-05-1994	05-13-1995	733	00257200	700043	LNS
Status Cd ID as of	09-05-1994	Outst Bal.	\$ 1,750 as of	06-30-1996	Acad Lvl:	2	

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER

Navigation Schematic for RC06 Aggregate Detail—1 of 2

There is a "+" sign in the MORE field, so press F8 to see the next part of the RC06 Aggregate Detail screen.

Notes:



RC06 GA/School Information(GS)							
NSLDS						03-02-1998	
Aggregate Detail By Loan Begin Date, Outstanding Bal. (Descending)						12:16:01	
SSN.....: 043906703		First Name: TARA MARIE		DOB: 02-16-1975		Name Hist: Y	
Curr SSN: 043906703		Last Name.: NUNEZ				MORE: -	
Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact-- Code	Type
- FFEL STAFFORD SUB	\$ 2,625	09-07-1993	05-14-1994	733	00257200	700043	LNS
Status Cd ID as of	09-07-1993	Outst Bal.	\$ 2,625 as of	06-30-1996	Acad Lvl: 1		
Status Cd	as of	Outst Bal.	as of	Acad Lvl:			
Status Cd	as of	Outst Bal.	as of	Acad Lvl:			
Status Cd	as of	Outst Bal.	as of	Acad Lvl:			
PRIVACY ACT OF 1974 (AS AMENDED)							
F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER							

RC06 Aggregate Detail—2 of 2

Guaranty Agency and School Information

The RC07 GA/School Information screen allows you to view guaranty agency and school information for the loan you select.

As an example, to find which guaranty agency guaranteed the student's most recent subsidized loan:

Step 1: Press F7 to go back to the RC06 Aggregate Detail screen with the most recent loans.

Step 2: Type GS on the action bar.

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Step 3: In the list of loans, type S to select the first loan.

Step 4: Press ENTER. This brings you to the RC07 GA/School Information screen.

Notes:



RC06 ☒ GA/School Information(GS)

NSLDS 03-02-1998
Aggregate Detail By Loan Begin Date, Outstanding Bal. (Descending) 12:16:02

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y
Curr SSN: 043906703 Last Name.: NUNEZ MORE: +

Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact-- Code	Type
<input checked="" type="checkbox"/> FFEL STAFFORD SUB	\$ 5,500	09-03-1996	05-22-1997	733	00258900	700204	LNS

Status Cd ID as of 09-03-1996 Outst Bal. \$ 2,750 as of 08-13-1996 Acad Lvl: 3

RC07 ☐ Organization Contact(OC)

NSLDS 03-02-1998
GA/School Information 12:16:03

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975
Last Name: NUNEZ

Originating School Information

School/Branch Code: 00258900
Name.....: UNIVERSITY OF NEW HAMPSHIRE
Street Address....: MAIN STREET
City.....: DURHAM State: NH Zip Code: 03824

Current GA Information

GA Code.....: 733 Name: NEW HAMPSHIRE HIGHER EDUCATION ASST.
Street Address....: P.O. BOX 877
City.....: CONCORD State: NH Zip Code: 033020000
Resp Begin date....:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT

Navigation Schematic for RC07 GA/School Information

Name History

Notes:



To view a student's name history:

Step 1: Press **F3** twice to return to the *RC05 Financial Aid Transcript Summary Part 1* screen.
Check this screen to see if NSLDS has name history information on the student. If it does, there will be a "Y" next to "Name Hist" in the upper right-hand portion of the screen.

Step 2: Type **NH** on the action bar and press **ENTER**. This will bring you to the *RC08 Name History* screen.

RC05	<u>NH</u>	FAT Summary Part 2 (P2)	Loan Detail (LD)	Aggregate Detail (AD)
		Overpayment Summary (OS)	Name Hist (NH)	Attendance Hist (AH)
NSLDS				03-02-1998
Financial Aid Transcript Summary Part 1				12:16:04
SSN..043906703		First Name..TARA MARIE__	DOB..02-16-1975	Schl Yr..1998
Curr SSN: 043906703		Last Name: NUNEZ	Name Hist: Y	
For				
Sel	RC08			
NSLDS				03-02-1998
Name History				12:16:05
For	SSN.....: 043906703		First Name: TARA MARIE	DOB: 02-16-1975
Agg	Current SSN: 043906703		Last Name.: NUNEZ	
MORE:				
First		M	Last	
TARA MARIE		M	NUNEZ	
TARA		M	SEARLES	
F3=				
PRIVACY ACT OF 1974 (AS AMENDED)				
F3=EXIT F7=BACKWARD F8=FORWARD				

Navigation Schematic for RC08 Name History

The *RC08 Name History* screen is used to correctly identify a student by displaying a history of all names used by the student on data submitted to NSLDS. Access to the *Name History* screen is only available if NSLDS contains more than one name for the student.

Notes:



School Attendance History

To view a student's attendance history:

- Step 1: Press **F3** to return to the *RC05 Financial Aid Transcript Summary Part 1* screen.
- Step 2: Type **AH** on the action bar and press **ENTER**. This brings you to the *RC0A School Attendance History* screen.

RC05 ☐ AH FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
 Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
 Financial Aid Transcript Summary Part 1 12:16:06

RC0A

NSLDS 03-02-1998
 School Attendance History 12:16:07

Student Name: TARA MARIE NUNEZ SSN: 043906703
 MORE:

Sch/Br Code: 00257200 Name: COLBY SAWYER COLLEGE
 Street Address: 100 MAIN STREET
 City.....: NEW LONDON State: NH Zip Code: 03257

Sch/Br Code: 00258900 Name: UNIVERSITY OF NEW HAMPSHIRE
 Street Address: MAIN STREET
 City.....: DURHAM State: NH Zip Code: 03824

Sch/Br Code: Name:
 Street Address:
 City.....: State: Zip Code:

Sch/Br Code: Name:
 Street Address:
 City.....: State: Zip Code:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

Navigation Schematic for RC0A School Attendance History

The RC0A School Attendance History screen lists schools in order of student attendance, with the school most recently attended listed first. The screen information includes:

- ◆ school branch code,
- ◆ school name, and
- ◆ school address.

A school will be listed only if the student obtained Title IV aid at the school that has been reported to NSLDS or if the school submitted an SSCR including information on that student.

AID OVERPAYMENT

NSLDS's overpayment function allows schools online access to view and update Federal Pell Grant, Federal Supplemental Educational Opportunity Grant (FSEOG), and Federal Perkins Loan overpayments.

There are **two methods** of accessing overpayment data:

1. **Through NSLDS's Financial Aid Transcript Summary function:** From the *Financial Aid Transcript Summary Part 1* screen, type **OS** on the action bar and press **ENTER**. This method is **view only**.
2. **Through NSLDS's Aid Overpayment function:** From the *SS04 NSLDS Main Menu*, type **2 (RC00 Reporting Capabilities Main Menu)** and press **ENTER**. Then type **7 (Aid Overpayment)** and press **ENTER**. With this method, you can **submit data directly to NSLDS**.

Notes:



Aid Overpayment Summary (View Only)

To access overpayment summary information about a different student:

Step 1: Press **F3** to return to the *RC05 Financial Aid Transcript Summary Part 1* screen.

Step 2: Press **F3** to reach the *RC00 Reporting Capabilities Main Menu* screen. Type **5** (*Financial Aid Transcript Summary*) and press **ENTER**. This is the best way to obtain an unpopulated *FAT Summary Part 1* screen ready for inputting another student's data.

Step 3: On the *RC05 FAT Summary Part 1* screen, type the **SSN**, **first name**, and **DOB** for Alycia P. Renee as follows:

- SSN: **444 44 4444**
- First name: **Alycia**
- DOB: **01-17-1968**

Step 4: Press **ENTER** to populate the screen for Alycia.

Notes:



RC05 ☐ OS FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
 Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
 Financial Aid Transcript Summary Part 1 12:16:06

SSN..444444444 First Name..ALYCIA_____ DOB..01-17-1968 Schl Yr..1998
 Curr SSN: 444444444 Last Name: RENEE Name Hist: N
 For Overpayment Summary Info make a selection (S) and press ENTER
 Sel Overpayment Contact Defaulted Loans....: N Discharged.....: N
☒ S Pell.....: Y 00104500 Loan Sat. Repayment: N Active Bankruptcy: N
 - FSEOG....: S 00104500
 - Perkins.: Y 01135900 Perkins Cumulative Loan Amount...: \$ N/A

F3 RC1D ☐ Overpayment Detail(OD)
 Ag

NSLDS 03-02-1998
 PELL Aid Overpayment Summary 12:16:08

School Code: 00104500 School Name: STONEWALL JACKSON STATE JUNIOR
 SSN: 444444444 Name: ALYCIA P RENEE DOB: 01-17-1968

MORE:

Sel	Disbursement Date (MM - DD - CCYY)	Type	Ovrpmt Indr	Date Repaid (MM - DD - CCYY)	School/Br Code	Source	Reg Code	Inact Flg
—	09 - 12 - 1997	PE	Y		00104500	SCH		
—	01 - 26 - 1998	PE	R	01 - 26 - 1998	00104500	SCH		

Valid Types are: Pell (PE), FSEOG (SE), Perkins (PK)
 Valid Overpayment Indicators are: Overpayment (Y), Repaid (R),
 Satisfactory arrangement made (S)
 Valid Sources are: School (SCH), Transfer to/from ED (TRF), ED DCS (EDR)

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

Navigation Schematic for RC1D Aid Overpayment Summary

The RC05 Financial Aid Transcript Summary Part 1 screen shows that NSLDS has overpayment data for Pell (Overpayment Indicator "Y"), for FSEOG (Overpayment Indicator "S"), and for Perkins (Overpayment Indicator "Y").

To display the Pell overpayment data:

Step 1: Type OS on the action bar.

Step 2: Type S on the Pell selection bar.

Step 3: Press ENTER. The Pell Aid Overpayment Summary screen appears.

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There are separate *RC1D Aid Overpayment Summary* screens for Pell, FSEOG, and Perkins. The screens indicate if a student:

- ◆ owes an overpayment,
- ◆ no longer owes an overpayment, or
- ◆ has made satisfactory arrangements to repay overpayments.

Notes:



Aid Overpayment Detail Information

Notes:



NSLDS has detailed information about each overpayment. To access the *RC0N Aid Overpayment Detail Information* screen:

Step 1: Type **OD** on the action bar of the *RC1D Aid Overpayment Summary* screen.

Step 2: Type **S** on the selection bar for the desired record. As an example, select the first Pell overpayment.

Step 3: Press **ENTER**. This will bring you to the *RC0N Aid Overpayment Detail Information* screen.

RC0N __ Organization Contact (OC)

NSLDS 03-02-1998
Aid Overpayment Detail Information 12:16:10

School Code: 00104600 School Name: STONEWALL JACKSON STATE JUNIOR
SSN: 444444444 Name: ALYCIA P RENEE DOB: 01-17-1968

Disbursement Date....: 09-12-1997 Inactive Flag: (Y=Inactive, Blank=Active)
Overpayment Type.....: PE Create Date...: 03-01-1998
Overpayment Indicator: Y Update Date...:
Date Repaid.....:
Source.....: SCH
ED Region.....:

Originating School Information

School/Branch Code: 00104500
Name.....: STONEWALL JACKSON STATE JUNIOR COL
Street Address....:
City.....: RAINSVILLE State: AL Zip Code: 35986

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT

RC0N Aid Overpayment Detail Information

The *RCON Aid Overpayment Detail Information* screen displays:

- ◆ create date (the date that the record was created),
- ◆ update date (the date that the record was updated),
- ◆ inactive flag, and
- ◆ originating school information (school code, name, and address).

Notes:

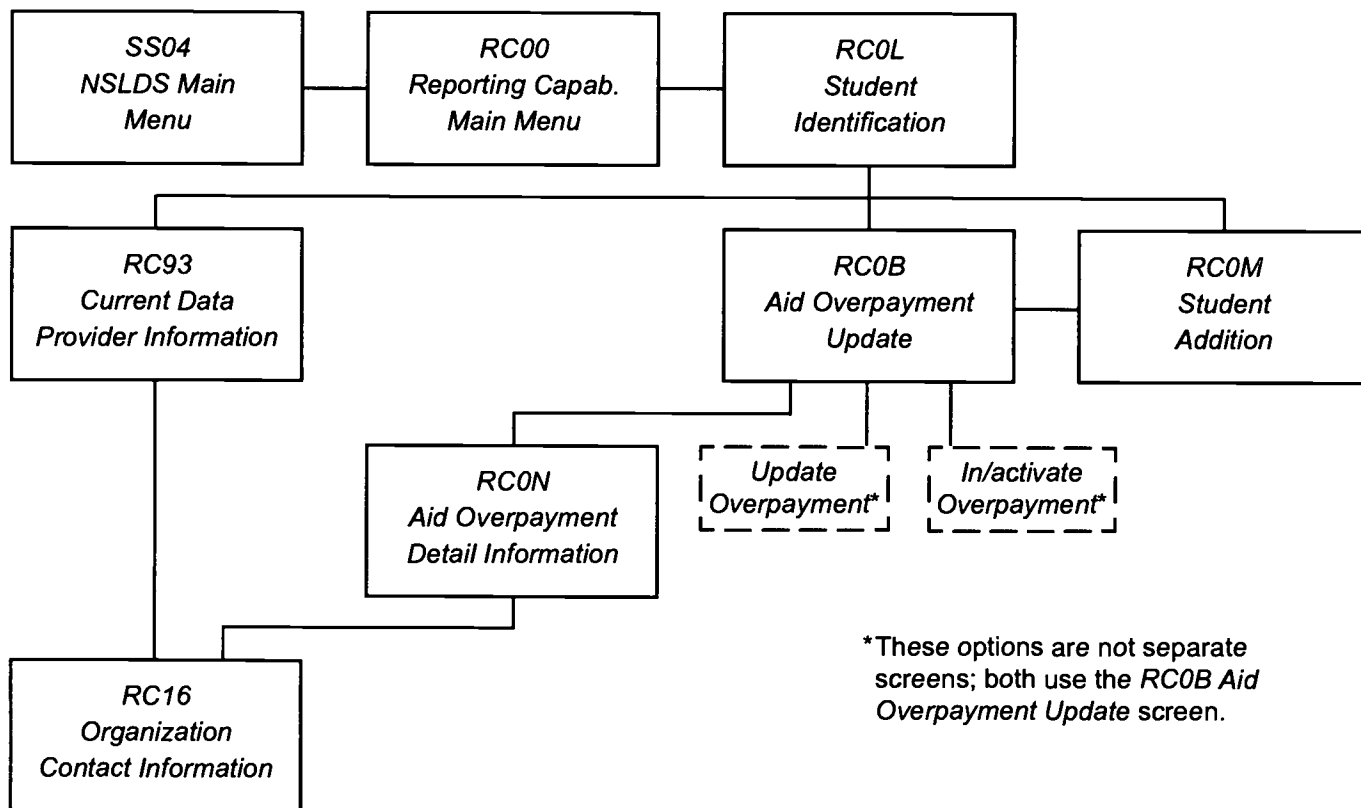


Accessing Aid Overpayment Screens Through NSLDS's *Aid Overpayment* Function

This method of accessing overpayment information allows you to submit student data to NSLDS.

Online Screen Navigation

The next page shows a "map" of the screens included in NSLDS's Aid Overpayment function. Please pull out this page for reference during the rest of the session.



Map of NSLDS's Aid Overpayment Function

You access the Aid Overpayment function from the *RC00 Reporting Capabilities Main Menu* screen.

- ◆ If you had just started NSLDS, and you were at the *SS04 NSLDS Main Menu* screen, you would type 2 and press **ENTER** to reach the *RC00 Reporting Capabilities Main Menu* screen.
- ◆ If you were already in another functional area of NSLDS, such as the FAT Summary screens, you would press **F3** until you returned to the *RC00 Reporting Capabilities Main Menu* screen.

Step 1: Type 7 (*Aid Overpayment*).

Step 2: Press **ENTER**. This would bring you to the unpopulated *RCOL Student Identification* screen.

Notes:



SS04

NSLDS
NSLDS Main Menu03-02-1998
12:16:11

Input the number of your choice and press ENTER.

- ☒ 1. System Support Main Menu
2. Reporting Capabilities Main Menu

RC00

NSLDS
Reporting Capabilities Main Menu03-02-1998
12:16:12

Input the number of your choice and press ENTER.

- ☒ 1. Aggregate Inquiry Main Menu
2. Default Rate Main Menu
3. Report Selection Menu
4. Borrower Tracking Security
5. Financial Aid Transcript Summary
6. Student Status Confirmation Menu
7. Aid Overpayment

RC0L _ Data Provider Info(DP) Overpayment Update(OU) Add Student(AS)

F3=

NSLDS
Student Identification03-02-1998
12:16:13

SSN.._____ First Name.._____ DOB... - - - (MM-DD-CCYY)

NAME HISTORY

First M Last DOB State Curr SSN

PRIVACY ACT OF 1974 (AS AMENDED)

RC0B46-I: Please input search criteria for Student and press Enter

F3=EXIT F7=BACKWARD F8=FORWARD

Navigation Schematic for RC0L Student Identification

Notes:

```

RC0L  _  Data Provider Info(DP)  Overpayment Update(OU)  Add Student(AS)
_____
                                NSLDS                                03-02-1998
                                Student Identification                12:16:14

SSN..444444444  First Name..ALYCIA_____  DOB..01 - 17 - 1968 (MM-DD-CCYY)

                                NAME HISTORY

First      M  Last      DOB      State  Curr SSN
ALYCIA     P  RENEE     01-17-1968  444444444

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD

```

RC0L Student Identification (Populated)

The *RCOL Student Identification* screen is the highest level for the Aid Overpayment function. The action codes you see depend on your access authority.

You use this screen to determine whether the overpayment you are entering is for a student already in NSLDS, or if you need to add the student before entering his/her overpayment information.

[illegible]

Current Data Provider Information

Notes:



To access current data provider information:

Step 1: Type **DP** on the *RCOL Student Identification* action bar.

Step 2: Press **ENTER**. This will bring you to the *RC93 Current Data Provider Information* screen.

```

RC93  _ Organization Contact(OC)
-----
                                NSLDS                      03-02-1998
                                Current Data Provider Information 12:16:15

Student/Borrower Name: GREGORY      T COLLINS              SSN: 043865160
                                MORE:
_ GA Code.....: 725          Name: AMERICAN STUDENT ASSISTANCE
Street Address.....: 330 STUART STREET
City.....: BOSTON          State: MA  Zip Code: 021165292
Resp Begin Date....: 09-04-1991

_ School/Branch Code.: 00214600  Name: EMERSON COLLEGE
Street Address.....: 100 BEACON STREET
City.....: BOSTON          State: MA  Zip Code: 02116

                                Name:
Street Address.....:
City.....:                State:    Zip Code:

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
  
```

RC93 Current Data Provider Information

The *RC93 Current Data Provider Information* screen lists the data providers that submitted information on the student.

- ♦ The screen includes guaranty agency, Federal Direct Loan servicer, or school name and address.

To determine who to contact to resolve conflicting information, you would:

Step 1: Type **OC** on the *RC93 Current Data Provider Information* action bar.

Step 2: **TAB** to the desired data provider and type **S** to select it.

Step 3: Press **ENTER** to display the *Organization Contact Information* screen.

Notes:



Student Addition

To enter overpayment information for a student who is not yet included in the NSLDS database, you must first add the student to NSLDS.

On the *RCOL Student Identification* screen, to add a student you would:

Step 1: Type the student's **SSN**, **first name**, and **date of birth**.

Step 2: Type **AS** (Add Student) on the action bar.

Step 3: Press **ENTER**. This brings you to the *RCOM Student Addition* screen.

RC0L **AS** Data Provider Info(DP) Overpayment Update(OU) Add Student(AS)

NSLDS	03-02-1998
Student Identification	12:16:13

SSN.. **578967890** First Name.. **Thomas** DOB.. **05 - 24 - 1978** (MM-DD-CCYY)RC0M **___** Add student Overpayment(AO)

Fi	NSLDS	03-02-1998
	Student Addition	12:16:16

RC	Social Security Number . . . : 578967890
	Last Name _____
	First Name : THOMAS _____
F3	Middle Initial _
	Date of Birth : 05 - 24 - 1978 (MM-DD-CCYY)

PRIVACY OF ACT OF 1974 (AS AMENDED)

F3=EXIT

RC0M Student Addition

The *Student Addition* screen displays the data you just entered and collects optional information for the new student record in NSLDS.

To continue the process of adding the new student, you would:

Step 4: Type **AO** on the action bar of the *Student Addition* screen.

Step 5: Type the optional information if you have it—**last name** and **middle initial**.

Step 6: Press **ENTER**.

Aid Overpayment Update

The new record for the student you are adding will only be created if an overpayment is now entered on the *RCOB Aid Overpayment Update* screen. This screen is shown below.

Notes:



RCOB ___ Overpymt Detail(OD) Update Overpymt(UO) In/activate Overpymt(IO)									
NSLDS								03-02-1998	
Aid Overpayment Update								12:16:17	
School Code: 00104500				School Name: STONEWALL JACKSON STATE JUNIOR					
SSN: 578967890				Name: THOMAS R JOHNSON				DOB: 05-24-1978	
MORE:									
Sel	Disbursement	Date	Type	Ovrpmt	Date Repaid	School/Br	Source	Reg	Inact
	(MM - DD - CCYY)			Incl	(MM - DD - CCYY)	Code		Code	Flg
-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-
-	-	-	-	-	-	-	-	-	-
Valid Types are: Pell (PE), FSEOG (SE), Perkins (PK)									
Valid Overpayment Indicators are: Overpayment (Y), Repaid (R),									
Satisfactory arrangement made (S)									
Valid Sources are: School (SCH), Transfer to/from ED (TRF), ED DCS (EDR)									
PRIVACY ACT OF 1974 (AS AMENDED)									
RCOB38-I: When an overpayment is added, student will also be added.									
F3=EXIT F7=BACKWARD F8=FORWARD									

RCOB Aid Overpayment Update

To enter overpayment information for the student you are adding, you would:

Step 1: Type **UO** (Update Overpayment) on the action bar.

Step 2: Type **S** in the Select column on the first line.

Step 3: Type the Disbursement Date.

Step 4: Key in the code for the type of aid—PE for Pell, SE for FSEOG, or PK for Perkins.

Step 5: Key in the Overpayment Indicator.

Notes:



Step 6: Key in the Date Repaid, if applicable, or leave this field blank to show that the overpayment has not been repaid.

Note: There is no need to key in the School/Branch Code—your school code will be entered as the default if you leave this field blank. Similarly, the Source can be left blank—SCH (School) will be entered for you.

The *RCOB Aid Overpayment Update* screen at this point, before pressing **ENTER**, is shown below.

RCOB <u>UO</u> Overpymt Detail(OD) Update Overpymt(UO) In/activate Overpymt(IO)									
NSLDS								03-02-1998	
Aid Overpayment Update								12:16:18	
School Code: 00104500				School Name: STONEWALL JACKSON STATE JUNIOR					
SSN: 578967890 Name: THOMAS				R JOHNSON				DOB: 05-24-1978	
MORE: +									
Sel	Disbursement Date	Type	Ovrpmt	Date Repaid	School/Br	Source	Reg	Inact	
	(MM - DD - CCYY)		Indr	(MM - DD - CCYY)	Code		Code	Flg	
<u>S</u>	<u>02</u> - <u>13</u> - <u>1998</u>	<u>PK</u>	<u>Y</u>	— - — -	—	—	—	—	—
—	— - — -	—	—	— - — -	—	—	—	—	—
—	— - — -	—	—	— - — -	—	—	—	—	—
—	— - — -	—	—	— - — -	—	—	—	—	—
Valid Types are: Pell (PE), FSEOG (SE), Perkins (PK)									
Valid Overpayment Indicators are: Overpayment (Y), Repaid (R),									
Satisfactory arrangement made (S)									
Valid Sources are: School (SCH), Transfer to/from ED (TRF), ED DCS (EDR)									
PRIVACY ACT OF 1974 (AS AMENDED)									
RCOB38-I: When an overpayment is added, student will also be added.									
F3=EXIT F7=BACKWARD F8=FORWARD									

RCOB Aid Overpayment Update—Entering an Overpayment for an Added Student

When you press **ENTER**, your school code and the source SCH would appear automatically in the appropriate fields, and you would see the message "*Aid Overpayment added successfully; Press enter to clear.*"

You would press **ENTER** once more to clear this message and add the student and the overpayment as a new record in NSLDS.

Aid Overpayment Updates for Students Already in NSLDS

The *RCOB Aid Overpayment Update* screen lets you:

- ◆ add new overpayments,
- ◆ report that overpayments have been repaid or that satisfactory arrangements have been made,
- ◆ indicate that overpayments have been referred to ED, and
- ◆ activate or deactivate overpayments.

For a student already in NSLDS, you would begin on the *RCOL Student Identification* screen. You would:

Step 1: Enter the student's **SSN**, **first name**, and **DOB**.

Step 2: Type **OU** (Overpayment Update) on the action bar.

Step 3: Press **ENTER**. The *RCOB Aid Overpayment Update* screen would then appear. A sample screen for a student who has existing overpayments is shown on the next page.

Notes:



RC0B __ Overpymt Detail(OD) Update Overpymt(UO) In/activate Overpymt(IO)

NSLDS
Aid Overpayment Update

03-02-1998
12:16:19

School Code: 00100700 School Name: CENTRAL ALABAMA COMMUNITY COLLEGE
SSN: 008562803 Name: JEFFREY DOWLING DOB: 07-07-1979

MORE: +

Sel	Disbursement Date (MM - DD - CCYY)	Type	Ovrpmt Indr	Date Repaid (MM - DD - CCYY)	School/Br Code	Source	Reg Code	Inact Flg
05	07 - 1995	PK	Y	00 - 00 - 0000	00100700	SCH	—	—
04	04 - 1994	PE	Y	00 - 00 - 0000	00122600	SCH	—	—
01	01 - 1996	SE	Y	00 - 00 - 0000	00122600	SCH	—	—
06	06 - 1996	SE	R	07 - 07 - 1996	00122600	SCH	—	—
—	— - — - —	—	—	— - — - —	—	—	—	—
—	— - — - —	—	—	— - — - —	—	—	—	—

Valid Types are: Pell (PE), FSEOG (SE), Perkins (PK)

Valid Overpayment Indicators are: Overpayment (Y), Repaid (R),
Satisfactory arrangement made (S)

Valid Sources are: School (SCH), Transfer to/from ED (TRF), ED DCS (EDR)

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

RC0B Aid Overpayment Update for Student Already in NSLDS***If a Student Owes an Overpayment***

To enter an overpayment:

Step 1: Type **UO** on the action bar.Step 2: **TAB** to the first blank line and type **S**.

Step 3: Type the following data:

- **disbursement date**,
- **code** for type of overpayment (listed at the bottom of the screen), and
- **Y** in the Overpayment Indicator field.

Step 4: Press **ENTER**. You'll see the message "*Aid Overpayment added successfully; Press enter to clear.*"Step 5: Press **ENTER** again to clear this message and add the overpayment.

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If a Student Has Repaid an Overpayment

To indicate that a student no longer owes a repayment:

Step 1: Type **UO** on the action bar.

Step 2: **TAB** to the desired choice and type **S**.

Step 3: Type **R** for "Repaid" in the Overpayment Indicator field.

Step 4: Type the **date repaid** in the Date Repaid field.

Step 5: Press **ENTER**.

If a Student Makes Satisfactory Repayment Arrangements

To indicate that a student has made satisfactory repayment arrangements:

Step 1: Type **UO** on the action bar.

Step 2: **TAB** to the desired choice and type **S**.

Step 3: Type **S** for "Satisfactory arrangement made" in the Overpayment Indicator field.

Step 4: Press **ENTER**.

If a Student's Overpayment Has Been Referred to ED

To indicate that a student's overpayment has been referred to ED:

Step 1: Type **UO** on the action bar.

Step 2: **TAB** to the desired choice and type **S**.

Notes:



Step 3: Type **TRF** for "Transfer to/from ED" in the Source field.

Step 4: Press **ENTER**.

Once ED has accepted the referral, ED will update the Source field to **EDR** and you will no longer be able to update the record.

Inactivating an Overpayment

To inactivate an overpayment entered in error:

Step 1: Type **IO** on the action bar.

Step 2: **TAB** to the desired choice and type **S**.

Step 3: Press **ENTER**. You'll see the message *"Please confirm request to In/activate ('Y' - Yes or 'N' - No)."*

Step 4: Type **Y** to confirm. A "Y" will appear in the Inact Flg field, and you'll see the message *"Successfully made the Overpayment inactive; Press Enter to Clear."*

Step 5: Press **ENTER** once more to clear this message and complete the process of inactivating the overpayment.

The record will be flagged inactive and it will not be reported as an overpayment for prescreening purposes.

Do **not** use this function to indicate that the student has repaid an overpayment or that you have referred the student's overpayment to ED.

Notes:



Activating an Overpayment

To activate an overpayment that is currently inactive:

Step 1: Type **IO** on the action bar.

Step 2: **TAB** to the desired choice and type **S**.

Step 3: Press **ENTER**.

Notes:



Aid Overpayment Detail Information

Notes:



To access the *RC0N Aid Overpayment Detail Information* screen, you would:

Step 1: Type **OD** on the action bar of the *RC0B Aid Overpayment Update* screen.

Step 2: **TAB** to the desired record and type **S**.

Step 3: Press **ENTER**.

RC0N — Organization Contact (OC)

NSLDS 03-02-1998
Aid Overpayment Detail Information 12:16:10

School Code: 00104600 School Name: STONEWALL JACKSON STATE JUNIOR
SSN: 444444444 Name: ALYCIA P RENEE DOB: 01-17-1968

Disbursement Date....: 09-12-1997 Inactive Flag: (Y=Inactive, Blank=Active)
Overpayment Type.....: PE Create Date...: 03-01-1998
Overpayment Indicator: Y Update Date...:
Date Repaid.....:
Source.....: SCH
ED Region.....:

Originating School Information
School/Branch Code: 00104500
Name.....: STONEWALL JACKSON STATE JUNIOR COL
Street Address.....:
City.....: RAINSVILLE State: AL Zip Code: 35986

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT

RC0N Aid Overpayment Detail Information

The *RC0N Aid Overpayment Detail Information* screen displays all overpayment information and the create date, update date, and inactive flag for the overpayment record selected. This screen also displays the originating school information for the overpayment record selected.

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CASE STUDIES

Notes:



CASE STUDY 1

SSN: 043 78 6359
Name: Lynn Apostole
DOB: 06-02-1955

The semester has begun and Lynn hasn't received an award letter, so she makes an appointment to see her financial aid counselor. After reviewing the file, her financial aid counselor explains to Lynn that she can't get any Title IV aid because she defaulted on a previously awarded NDSL. Lynn explains that she has made satisfactory repayment arrangements for that loan.

1. *Did Lynn make satisfactory repayment arrangements?*
2. *Which school provided the status of the NDSL?*

CASE STUDY 2

SSN: 043 86 5256
Name: Roger Cruver
DOB: 01-02-1958

Roger visits the financial aid office because his SAR states that he is not eligible to receive federal student financial aid due to a default on a loan. Roger admits that he defaulted on several loans, but explains that he consolidated the loans; therefore, he should be eligible to receive federal student financial aid.

1. *Does NSLDS show that Roger consolidated any of his Title IV loans?*
2. *Are any of Roger's loans in default? Is Roger eligible to receive a Title IV loan?*

CASE STUDY 3

SSN: 043 70 3123
Name: Mona Lee Kij
DOB: 01-31-1950

Mona Lee Kij is a returning student. She attended your school 15 years ago. Mona Lee has married twice and has attended two other schools prior to returning to your school.

Did Mona Lee receive federal student financial aid using her maiden or married names?

Notes:

**CASE STUDY 4**

SSN: 043 86 4791
Name: Joanne Smith
DOB: 11-09-1961

Joanne wants to consolidate her undergraduate and graduate school loans. To complete the consolidation loan application, Joanne has to list each loan she has received. She knows that she has both subsidized and unsubsidized loans. In addition to the amount of each loan she received, Joanne would like to know the outstanding balance of each subsidized and unsubsidized loan.

1. *What amounts did Joanne borrow for each subsidized loan, and what are the outstanding balances?*
2. *What amounts did Joanne borrow for each unsubsidized loan, and what are the outstanding balances?*

CASE STUDY 5

You will be given the identifiers for a "dummy" student in the NSLDS Training Database. Use the Aid Overpayment function to:

1. Find whether the student has existing overpayments.
2. Add a Pell overpayment.
3. Inactivate the Pell overpayment.
4. Activate the Pell overpayment again.
5. Enter data to show that the Pell overpayment has been repaid.

Notes:



CASE STUDY 6

Make up the identifiers for a "dummy" student to add to the NSLDS Training Database. Use the Aid Overpayment function to:

1. Add the new student to NSLDS.
2. Add a Perkins overpayment for this student.
3. Enter data to show that the student has made satisfactory arrangements to repay the Perkins overpayment.



ANSWER KEY

Notes:



CASE STUDY 1

Q1. Did Lynn make satisfactory repayment arrangements?

Step 1: Navigate to the *Reporting Capabilities Main Menu* screen, then type **5** and press **ENTER** to access the *Financial Aid Transcript Summary Part 1* screen.

Step 2: Key in the student's **SSN**, **First Name**, and **DOB** and press **ENTER** to populate the screen.

Step 3: Look at the **Loan Sat. Repayment** field to see if there is a "Y" (yes) or "N" (no). There is a "Y."

A1. Yes, Lynn made satisfactory repayment arrangements.

Q2. Which school provided the status of the NDSL?

Step 1: While still at the populated *RC05 Financial Aid Transcript Summary Part 1* screen, type **LD** on the action bar and press **ENTER** to access the *RC06 Loan Detail* screen.

Step 2: Press **F8** to view more loan detail information until you see the **NDSL**. Notice that the **Status Code** for this loan is **DX** (Defaulted, Six Consecutive Payments), so that this loan's status would not prevent Lynn from receiving Title IV aid.

Step 3: Type **GS** on the action bar, **TAB** to the selection bar for the NDSL, then type **S** and press **ENTER**. This displays the *RC07 GA/School Information* screen.

A2. Hesser College provided the status of the NDSL.

CASE STUDY 2

Q1. Does NSLDS show that Roger consolidated any of his Title IV loans?

Step 1: Press **F3** until you reach the *Reporting Capabilities Main Menu* screen, then navigate to the *Financial Aid Transcript Summary Part 1* screen. (This is the best way to obtain an unpopulated FAT screen ready for inputting a new student's data.)

Step 2: Key in the student's **SSN**, **First Name**, and **DOB** and press **ENTER** to populate the *Part 1* screen.

Step 3: Look at the *Aggregate Detail* section of the *Part 1* screen to see if there is a loan amount listed on the *Consolidated Loans* row.

A1. No, according to NSLDS, Roger didn't consolidate any of his loans, because there is no amount entered in the Consolidated Loans section of the Financial Aid Transcript Summary Part 1 screen.

Notes:



Q2. Are any of Roger's loans in default? Is Roger eligible to receive a Title IV loan?

Step 1: To check on the status of Roger's individual loans, type LD on the action bar of the *Financial Aid Transcript Summary Part 1* screen and press ENTER. This brings you to the *RC06 Loan Detail* screen.

Step 2: Look at the status codes of the loans, pressing F8 as necessary to view the other loans. Most of the loans have a "DU" (Defaulted, Unresolved) status code.

A2. According to NSLDS, Roger is in default on several Title IV loans, so he is not eligible to receive a Title IV loan.

Roger may have consolidated his defaulted loans, and NSLDS may not yet have received the updated information. If Roger can document that his loans have been consolidated, the FAA may disburse aid based on that documentation even if NSLDS has not yet been updated.

When NSLDS is updated, the "DU" loan status codes will change to "PC" (Paid in Full Through Consolidation Loan).

Notes:



CASE STUDY 3

Q. Did Mona Lee receive federal student financial aid using her maiden or married names?

Step 1: Press **F3** until you reach the *Reporting Capabilities Main Menu* screen, then navigate to the *Financial Aid Transcript Summary Part 1* screen. (Again, this is the best way to obtain an unpopulated FAT screen ready for inputting a new student's data.)

Step 2: Key in the student's **SSN**, **First Name**, and **DOB** and press **ENTER** to populate the *Part 1* screen.

Step 3: Check to see if there is a "Y" in the *Name Hist* field.

Step 4: Type **NH** on the action bar and press **ENTER** to view the *RC08 Name History* screen.

A. Mona Lee received financial aid using the following names:

- Mona Lee Kij
- Mona Palladino
- MonaLee Chropufka

Notes:



CASE STUDY 4

Q1. What amounts did Joanne borrow for each subsidized loan, and what are the outstanding balances?

Notes:



Step 1: Press **F3** until you reach the *Reporting Capabilities Main Menu* screen, then navigate to the *Financial Aid Transcript Summary Part 1* screen. (Again, this is the best way to obtain an unpopulated FAT screen ready for inputting a new student's data.)

Step 2: Key in the student's **SSN**, **First Name**, and **DOB** and press **ENTER** to populate the *Part 1* screen.

Step 3: Type **AD** on the action bar.

Step 4: In the Aggregate Detail section of the screen, click the mouse to position the cursor next to Subsidized Loans. Type **S** and press **ENTER**. This brings you to the *RC06 Aggregate Detail* screen with subsidized loans displayed.

A1. Joanne borrowed the following subsidized loans:

<i>Loan Type</i>	<i>Amt.</i>	<i>Outstanding Bal.</i>
<i>FFEL Stafford</i>	<i>\$8,500</i>	<i>\$2,125</i>
<i>FFEL Stafford</i>	<i>\$7,590</i>	<i>\$7,590</i>
<i>FFEL Stafford</i>	<i>\$5,733</i>	<i>\$5,043</i>
<i>FFEL Stafford</i>	<i>\$2,767</i>	<i>\$2,767</i>
<i>FFEL Stafford</i>	<i>\$1,500</i>	<i>\$1,500</i>
<i>FFEL Stafford</i>	<i>\$4,000</i>	<i>\$4,000</i>
<i>FFEL Stafford</i>	<i>\$3,900</i>	<i>\$3,900</i>
<i>FFEL Stafford</i>	<i>\$2,625</i>	<i>\$2,625</i>
<i>FFEL Stafford</i>	<i>\$2,625</i>	<i>\$2,625</i>

Q2. What amounts did Joanne borrow for each unsubsidized loan, and what are the outstanding balances?

Step 1: Press **F3** until you reach the populated *RC05 Financial Aid Transcript Summary Part 1* screen.

Step 2: Type **AD** on the action bar.

Step 3: In the Aggregate Detail section of the screen, click the mouse to position the cursor next to Unsubsidized Loans. Type **S** and press **ENTER**. This brings you to the *RC06 Aggregate Detail* screen with unsubsidized loans displayed.

Notes:



A2. Joanne borrowed these unsubsidized loans:

<i>Loan Type</i>	<i>Amt.</i>	<i>Outstanding Bal.</i>
<i>FFEL Stafford Unsub</i>	<i>\$5,043</i>	<i>\$5,043</i>
<i>Supplem. Loan-SLS</i>	<i>\$2,200</i>	<i>\$2,200</i>
<i>Supplem. Loan-SLS</i>	<i>\$1,800</i>	<i>\$1,800</i>
<i>Supplem. Loan-SLS</i>	<i>\$1,500</i>	<i>\$1,500</i>
<i>Supplem. Loan-SLS</i>	<i>\$1,100</i>	<i>\$1,100</i>
<i>Supplem. Loan-SLS</i>	<i>\$1,925</i>	<i>\$1,925</i>

CASE STUDY 5

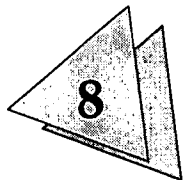
See pages Seven-30 through Seven-43 for model procedures and screens relevant to this case study.

CASE STUDY 6

See pages Seven-30 through Seven-43 for model procedures and screens relevant to this case study.

Notes:





Borrower Tracking

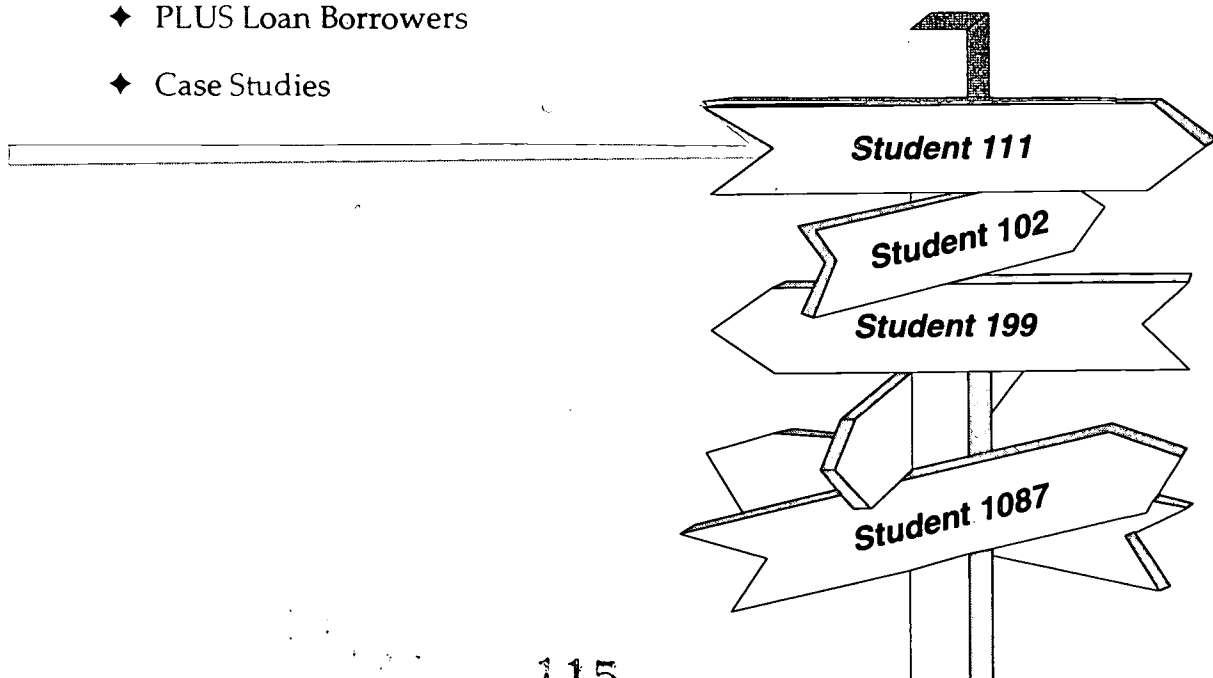
Objectives

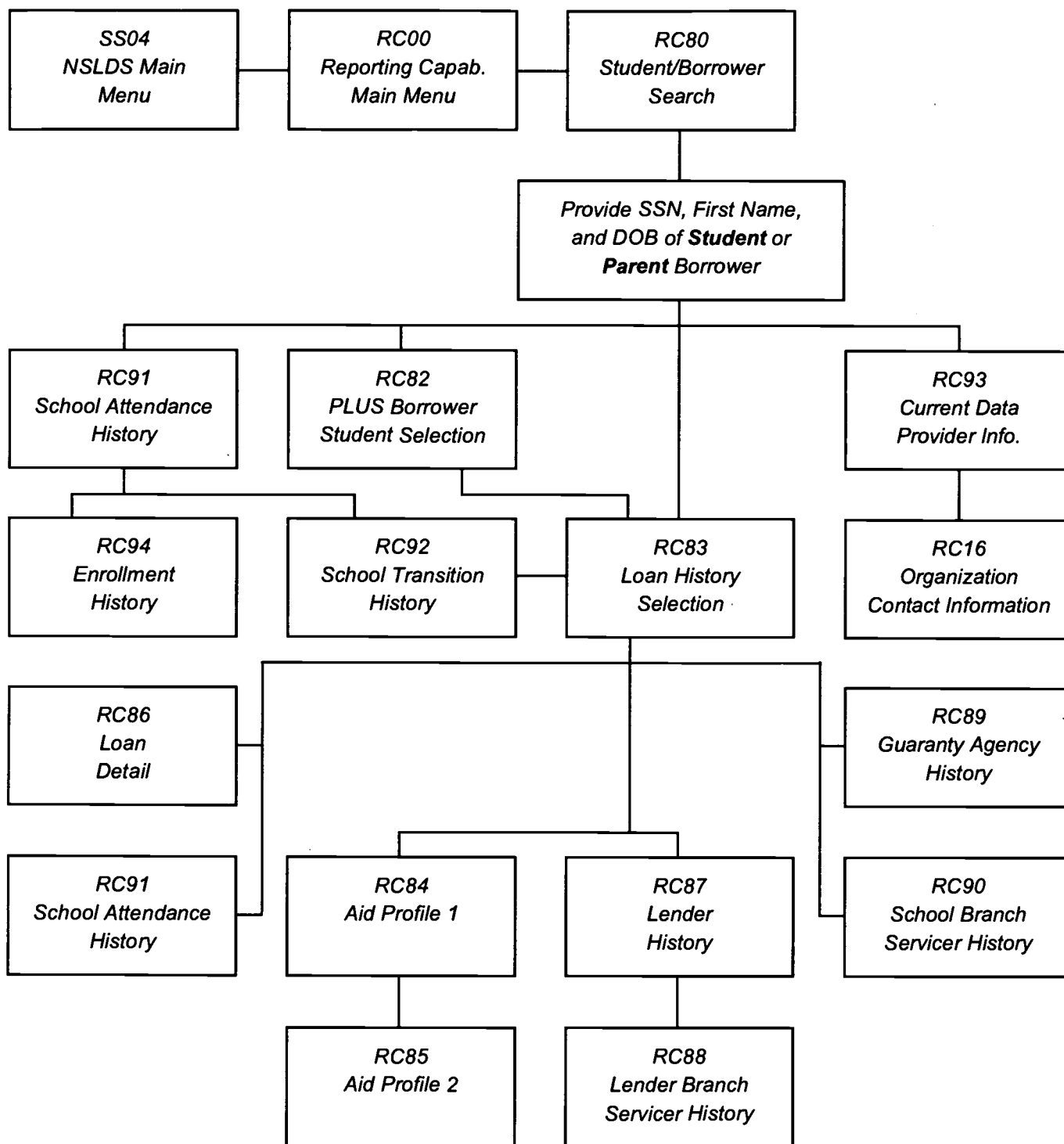
After completing this session, you will be able to:

- ◆ navigate through NSLDS's borrower tracking screens, and
- ◆ use the information on these screens.

Contents

- ◆ Student Borrowers
- ◆ PLUS Loan Borrowers
- ◆ Case Studies





Map of NSLDS's Borrower Tracking Function

Introduction

Borrower tracking helps schools obtain a full history of a borrower's loans. You can review the student's loan status and the date that the status changed, as well as principal and interest amounts. If you need to determine which lender or agency originated or serviced the loan, you can also obtain that information from borrower tracking.

- ◆ All of the screens are **view only**, so you can't change any information on the screens.
- ◆ Any information contained on these screens is protected under the Privacy Act.

Online Screen Navigation

The previous page shows a "map" of the screens included in NSLDS's Borrower Tracking function. Please pull out this page for reference during the rest of the session.

Notes:



Student/Borrower Search

Here's how you access the first borrower tracking screen (*Student/Borrower Search*):

Step 1: At the *SS04 NSLDS Main Menu* screen, type **2** (*Reporting Capabilities Main Menu*) and press **ENTER**.

Step 2: At the *RC00 Reporting Capabilities Main Menu*, type **4** (*Borrower Tracking Security*) and press **ENTER**.

This brings you to the *RC80 Student/Borrower Search* screen.

Notes:



SS04

NSLDS 03-16-1998
NSLDS Main Menu 09:08:10

Input the number of your choice and press ENTER.

- ☒ 2. 1. System Support Main Menu
2. Reporting Capabilities Main Menu

RC00

NSLDS 03-16-1998
Reporting Capabilities Main Menu 09:08:11

F3

Input the number of your choice and press ENTER.

- ☒ 4. 1. Aggregate Inquiry Main Menu
2. Default Rate Main Menu
3. Report Selection Menu
4. Borrower Tracking Security

RC80 — curr Data Provider info(DP) LOan hist(LO) Attendance Hist(AH)
Plus borrower Student selection(PS)

NSLDS 03-16-1998
Student/Borrower Search 09:08:12

F3

SSN.. _____ First Name.. _____ DOB.. __-__-____ (MM-DD-YYYY)
PLUS Borrower(P)/Student(S).. S

NAME HISTORY

Sel First M Last DOB State Curr SSN

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

Navigation Schematic for RC80 Student/Borrower Search

You will use the following function keys to navigate through the borrower tracking screens:

F3 return to previous higher level screen

F7 scroll back one screen

F8 scroll forward one screen

F12 return to *RC80 Student/Borrower Search* screen

To populate the *RC80 Student/Borrower Search* screen:

Step 1: **TAB** to the SSN field and type the student/borrower's **SSN**. As an example, use **043 86 5160**. The cursor automatically advances to the First Name prompt.

Step 2: Type the **first name**. As an example, use **Gregory**. Press **TAB** to advance to the next prompt, **DOB** (Date of Birth).

Step 3: Type the **DOB** in **MM-DD-CCYY** format. As an example, use **11-01-1971**. Do *not* type the hyphens—they are already there.

Step 4: The cursor automatically advances to the next prompt—**PLUS** Borrower/Student. The default option, **S** for student, is displayed, so just press **ENTER**.

Notes:



RC80 — curr Data Provider info(DP) LOan hist(LO) Attendance Hist(AH)
Plus borrower Student selection(PS)

NSLDS 03-16-1998
Student/Borrower Search 09:08:13

SSN.. 043865160 First Name.. GREGORY____ DOB.. 11-01-1971 (MM-DD-YYYY)
PLUS Borrower(P)/Student(S).. S

NAME HISTORY

MORE:

Sel	First	M Last	DOB	State	Curr SSN
_	GREGORY	T COLLINS	11-01-1971		043865160

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

RC80 Student/Borrower Search

The *RC80 Student/Borrower Search* screen provides a name history for the student, if available. In addition, the state of residence of the borrower is provided to aid in locating the borrower. This screen allows access to all the other screens and data search functions within borrower tracking.

Here are the action codes you can type on the action bar to view different borrower tracking screens.

DP takes you to the *RC93 Current Data Provider Information* screen.

LO takes you to the *RC83 Loan History Selection* screen.

AH takes you to the *RC91 School Attendance History* screen.

PS takes you to the *RC82 PLUS Borrower Student Selection* screen, which displays information on parent borrowers associated with students.

STUDENT BORROWERS

Notes:

*Current Data Provider Information*

To access the RC93 Current Data Provider Information screen:

Step 1: Type **DP** on the action bar in the RC80 Student/Borrower Search screen.

Step 2: **TAB** to Name History and type **S** next to the name history record you want to see.

Step 3: Press **ENTER**.

RC80 ☐ **DP** curr Data Provider info(DP) LOan hist(LO) Attendance Hist(AH)
Plus borrower Student selection(PS)

NSLDS 03-16-1998
Student/Borrower Search 09:08:13

SSN.. 043865160 First Name.. GREGORY____ DOB.. 11-01-1971 (MM-DD-YYYY)
PLUS Borrower(P)/Student(S).. S

NAME HISTORY

MORE:

Sel	First	M Last	DOB	State	Curr SSN
<input type="checkbox"/>	GREGORY	T COLLINS	11-01-1971		043865160

RC93 — Organization Contact(OC)

NSLDS 03-16-1998
Current Data Provider Information 09:08:15

F3=F Student/Borrower Name: GREGORY T COLLINS SSN: 043865160
MORE:

— GA Code.....: 725 Name: AMERICAN STUDENT ASSISTANCE
Street Address.....: 330 STUART STREET
City.....: BOSTON State: MA Zip Code: 021165292
Resp Begin Date.....: 09-04-1991

— School/Branch Code.: 00214600 Name: EMERSON COLLEGE
Street Address.....: 100 BEACON STREET
City.....: BOSTON State: MA Zip Code: 02116

Name:

Street Address.....:

City.....:

State: Zip Code:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

Navigation Schematic for RC93 Current Data Provider Information

The RC93 *Current Data Provider Information* screen displays guaranty agency (GA)/ school names and addresses in date specific order. GA information is displayed first, followed by school information. GA information is listed if a student has FFEL loans. School information is listed only if the student has campus-based loans. The "Responsible Begin Date" is the date that the data provider is responsible for the loan.

Notes:



Loan History

To access the RC83 *Loan History Selection* screen:

Step 1: Press **F3** from the RC93 *Current Data Provider Information* screen to return to the RC80 *Student/Borrower Search* screen.

On the *Student/Borrower Search* screen, the Name History section shows that this student has used only one name. Since there is only one choice in the Sel column, you don't need to type **S** to select it—the system will choose it by default.

Step 2: Type **LO** on the action bar and press **ENTER**. This brings you to the RC83 *Loan History Selection* screen.

RC80 ☐ LO curr Data Provider info(DP) LOan hist(LO) Attendance Hist(AH)
Plus borrower Student selection(PS)

NSLDS 03-16-1998
Student/Borrower Search 09:08:13

SSN.. 043865160 First Name.. GREGORY____ DOB.. 11-01-1971 (MM-DD-YYYY)
PLUS Borrower(P)/Student(S).. S

NAME HISTORY

MORE:

Sel First M Last DOB State Curr SSN
☐ GREGORY T COLLINS 11-01-1971 043865160

RC83 ____ Aid profile 1(A1) Loan Detail(LD) Lender History(LH)
Guar agency Hist(GH) Attendance His(AH) School servicer His(SH)

NSLDS 03-16-1998
Loan History Selection 09:08:17

F3=E

Student Name: GREGORY T COLLINS SSN: 043865160
PLUS Name...: LESLIE J BENKOVIC SSN: 052727808
Current School/Branch Code: 00214600
Current School Name.....: EMERSON COLLEGE
City.....: BOSTON State: MA

Sel	Loan Type	Certification/ Guaranty Date	Period Begin Date	Period End Date	Amount	Curr Loan Status	MORE: + Originating School/Branch
-	SU	01-26-1995	09-12-1994	05-02-1995	5000	RP	00214600
-	SF	09-22-1994	09-12-1994	05-02-1995	5500	RP	00214600
-	SL	12-03-1993	09-13-1993	05-03-1994	4000	RP	00214600
-	SF	11-03-1993	09-13-1993	05-03-1994	3500	RP	00214600
-	PU	10-04-1993	09-13-1993	05-03-1994	1000	PF	00214600
-	SF	10-23-1992	09-14-1992	05-06-1993	2625	RP	00214600
-	PU	10-05-1992	09-14-1992	05-03-1993	1000	PF	00214600

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

Navigation Schematic for RC83 Loan History Selection

The RC83 Loan History Selection screen displays the following information:

- ◆ current school,
- ◆ loan type,
- ◆ certification/guaranty date,
- ◆ loan period begin and end dates,
- ◆ loan amount,

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- Notes:**

If there is a "+" in the MORE field, this means there are additional loans. Press F8 to view them.

RC83 Loan History Selection (Showing "MORE" Information)

Notice that there is now a "-" sign in the MORE field, reminding you that there are loans on a previous screen. Press F7 to view the previous screen.

A list of loan type codes is provided on the next page.

A list of loan status codes is provided on page 13.

Loan Program	Loan Type Codes	Definition
FFEL	CL PL SF SL SU SN	Consolidation PLUS Stafford Subsidized Federal SLS Stafford Unsubsidized Stafford Non-Subsidized
FDLP	D1 D2 D4 D5 D6 D7	Direct Stafford Subsidized Direct Stafford Unsubsidized Direct PLUS Direct Consolidation Unsubsidized Direct Consolidation Subsidized Direct Consolidation PLUS
FISL	FI RF	Federally Insured Student Loan Refinanced
Perkins	DU EU IC NU PU	National Defense Student Loan Perkins Expanded Lending Option Income Contingent Loan National Direct Student Loan Perkins Loan

Loan Type Codes

Status Code	Description
AE	Assigned to U.S. Department of Education
BC	Bankruptcy Claim, Discharged
BK	Bankruptcy Claim, Active
CA	Cancelled
DA	Deferred
DB	Defaulted, Then Bankrupt, Active, Chapter 13
DC	Defaulted, Compromise
DD	Defaulted, Then Died
DE	Death
DI	Disability
DK	Defaulted, Then Bankrupt, Discharged, Chapter 13
DL	Defaulted, In Litigation
DO	Defaulted, Then Bankrupt, Active, Other
DP	Defaulted, Paid In Full
DS	Defaulted, Then Disabled
DT	Defaulted, Collection Terminated
DU	Defaulted, Unresolved
DW	Defaulted, Write-Off
DX	Defaulted, Six Consecutive Payments
FB	Forbearance
ID	In School or Grace Period
OD	Defaulted, Then Bankrupt, Discharged, Other
PC	Paid in Full Through Consolidation Loan
PF	Paid in Full
RF	Refinanced
RP	In Repayment
UI	Unreinsured

Loan Status Codes

Aid Profile 1

Aid profile information is displayed on two screens—*RC84 Aid Profile 1* and *RC85 Aid Profile 2*.

To view the *RC84 Aid Profile 1* screen:

Step 1: Type **A1** on the action bar of the *RC83 Loan History Selection* screen.

Step 2: Type **S** next to the loan record you want to select for viewing.
As an example, select "SU."

Step 3: Press **ENTER**. This brings you to the *RC84 Aid Profile 1* screen.

The *RC84 Aid Profile 1* screen displays:

- ◆ school branch,
- ◆ school branch servicer,
- ◆ loan period begin and end dates,
- ◆ certification/guaranty date,
- ◆ outstanding principal balance and date,
- ◆ outstanding interest balance and date, and
- ◆ current lender branch and servicer.

Notes:



RC83 **A1** Aid profile 1(A1) Loan Detail(LD) Lender History(LH)
 Guar agency Hist(GH) Attendance His(AH) School servicer His(SH)

NSLDS 03-16-1998
 Loan History Selection 09:08:19

Student Name: GREGORY T COLLINS SSN: 043865160
 PLUS Name....: LESLIE J BENKOVIC SSN: 052727808
 Current School/Branch Code: 00214600
 Current School Name.....: EMERSON COLLEGE
 City.....: BOSTON State: MA

Sel	Type	Guaranty Date	Begin Date	End Date	Amount	Status	School/Branch
S	SU	01-26-1995	09-12-1994	05-02-1995	5000	RP	00214600

RC84 — Aid profile 2(A2) Loan Detail(LD) Guaranty agency His(GH)
 Lender History(LH) School servicer His(SH) Loan history(LO)

NSLDS 03-16-1998
 Aid Profile 1 09:08:20

Student Name: GREGORY T COLLINS SSN: 043865160
 PLUS Name....: LESLIE J BENKOVIC SSN: 052727808

F3=E School/Branch Code: 00214600 School Status:

School Name.: EMERSON COLLEGE

Address.....: 100 BEACON STREET

BOSTON MA 02116

School Branch Servicer Code:

Loan Period Begin Date.....: 09-12-1994 Loan Period End Date.: 05-02-1995

Certification/Guaranty Date: 01-26-1995 Loan Amount: 5000 Loan Type: SU

Outstanding Principal Bal...: 5000 Outstanding Principal Bal Date: 01-26-1995

Outstanding Interest Bal...: Outstanding Interest Bal Date.: 01-26-1995

Current Lender/Br: 829988 0000 Name: NELLIE MAE - TREASURER

Lender Branch Address: 50 BRAINTREE HILL PARK SUITE 300

BRAINTREE

MA 021840000 Phone: 6178491325

Current Lender Branch Servicer:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F12=RETURN

Navigation Schematic for RC84 Aid Profile 1

Aid Profile 2

Notes:



To view the *RC85 Aid Profile 2* screen:

Step 1: Type **A2** on the action bar of the *RC84 Aid Profile 1* screen.

Step 2: Press **ENTER**.

RC85	Loan Detail(LD)	Lender History(LH)	Guaranty agency His(GH)
	LOan history(LO)		
		NSLDS	03-16-1998
		Aid Profile 2	09:08:21
Student Name: GREGORY	T COLLINS	SSN: 043865160	
PLUS Name...: LESLIE	J BENKOVIC	SSN: 052727808	
Originating Lender: 813478		Name: LOWELL FIVE CENT SAVINGS BANK	
Address.....: 34 JOHN STREET			
LOWELL		MA 018520000	Phone: 5084521300
Current Guaranty Agency: 725		Name: AMERICAN STUDENT ASSISTANCE	
Address.....: 330 STUART STREET			
BOSTON		MA 021165292	
Originating Guar Agency: 725		Name: AMERICAN STUDENT ASSISTANCE	
Address.....: 330 STUART STREET			
BOSTON		MA 021165292	
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT F12=RETURN			

RC85 Aid Profile 2

The *RC85 Aid Profile 2* screen is an extension of the *Aid Profile 1* screen.

- ◆ This screen displays the originating lender and current and originating guaranty agency information.
- ◆ You can access this screen only from the *Aid Profile 1* screen.

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Loan Detail

To access the *RC86 Loan Detail* screen from the *RC85 Aid Profile 2* screen:

Step 1: Type **LD** on the action bar.

Step 2: Press **ENTER**.

Notes:



RC86 — Aid profile 1(A1) Lender History(LH) Guaranty agency History(GH)
School servicer History(SH) L0an history(L0)

NSLDS 03-16-1998
Loan Detail 09:08:22

Student Name: GREGORY T COLLINS SSN: 043865160
PLUS Name...: LESLIE J BENKOVIC SSN: 052727808
Loan Type: SU Amount: 5000 Certification/Guaranty Date...: 01-26-1995
Period Begin Date....: 09-12-1994 Period End Date.....: 05-02-1995

Outstanding Principal Bal: 5000 Outstanding Principal Bal Date: 01-26-1995
Outstanding Interest Bal.: Outstanding Interest Bal Date.: 01-26-1995

MORE:

-- Disbursement --		-- Cancellation --		---- Refund ----		---- Status ----	
Date	Amount	Date	Amount	Date	Amount	Date	Code
01-26-1995	5000					11-04-1995	RP
						01-26-1995	ID

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC86 Loan Detail

The *RC86 Loan Detail* screen displays the current loan status as well as financial details. It is useful in determining the dates and amounts associated with loan disbursement, cancellation, and refund.

Lender History

Notes: _____



To see which lender currently holds this loan: _____

Step 1: Type **LH** on the action bar of the
RC86 Loan Detail screen.

Step 2: Press **ENTER**.

```

RC87  _ Aid profile 1(A1)   Loan Detail(LD)   Lender Br serv his(LB)
      Guar agency His(GH)  L0an history(LO)

                                NSLDS                      03-16-1998
                                Lender History              09:08:23

Student Name: GREGORY          T COLLINS                SSN: 043865160
PLUS Name....: LESLIE         J BENKOVIC          SSN: 052727808

Loan Type: SU  Amount:   5000      Certification/Guaranty Date...: 01-26-1995
Period Begin Date....: 09-12-1994  Period End Date.....: 05-02-1995
Sel                                     MORE:
_ Lender Code....: 829988  Lender Branch Code: 0000  Phone Number: 6178491325
  Lender Name....: NELLIE MAE - TREASURER
  Street Address: 50 BRAINTREE HILL PARK SUITE 300
  City.....: BRAINTREE                State: MA  Zip Code: 021840000
  Responsible Begin Date: 02-25-1995  Responsible End Date: 12-31-9999
_ Lender Code....: 813478  Lender Branch Code: 0000  Phone Number: 5084521300
  Lender Name....: LOWELL FIVE CENT SAVINGS BANK
  Street Address: 34 JOHN STREET
  City.....: LOWELL                    State: MA  Zip Code: 018520000
  Responsible Begin Date: 01-26-1995  Responsible End Date: 02-24-1995
  
```

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC87 Lender HistoryThe *RC87 Lender History* screen displays: _____

- ◆ lender code, _____
- ◆ lender branch code, _____
- ◆ lender name and address, _____
- ◆ telephone number, and _____
- ◆ responsible begin and end dates. _____

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Lender Branch Servicer History

Notes:



To access the *RC88 Lender Branch Servicer History* screen from the *RC87 Lender History* screen:

Step 1: Type **LB** on the action bar.

Step 2: Type **S** next to the record you want to select for viewing. As an example, select the first record.

Step 3: Press **ENTER**.

RC87	<input checked="" type="checkbox"/> LB	Aid profile 1(A1)	Loan Detail(LD)	Lender Br serv his(LB)
		Guar agency His(GH)	LOan history(LO)	
NSLDS			03-16-1998	
Lender History			09:08:24	
Student Name: GREGORY		T COLLINS	SSN: 043865160	
PLUS Name....: LESLIE		J BENKOVIC	SSN: 052727808	
Loan Type: SU		Amount: 5000	Certification/Guaranty Date...: 01-26-1995	
Period Begin Date....: 09-12-1994		Period End Date.....: 05-02-1995		
Sel		MORE:		
<input checked="" type="checkbox"/> S	Lender Code....: 829988 Lender Branch Code: 0000 Phone Number: 6178491325			
	Lender Name....: NELLIE MAE - TREASURER			
	Street Address: 50 BRAINTREE HILL PARK SUITE 300			
	City.....: BRAINTREE		State: MA	Zip Code: 021840000
	Responsible Begin Date: 02-25-1995		Responsible End Date: 12-31-9999	
	Lender Code....: 813478 Lender Branch Code: 0000 Phone Number: 5084521300			
	Lender Name....: LOWELL FIVE CENT SAVINGS BANK			
	Street Address: 34 JOHN STREET			
	City.....: LOWELL		State: MA	Zip Code: 018520000
	Responsible Begin Date: 01-26-1995		Responsible End Date: 02-24-1995	
PRIVACY ACT OF 1974 (AS AMENDED)				
RC866-I: No Lender Branch Servicer History for the loan				
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN				

RC87 Lender History Screen Showing "No Lender Branch Servicer History" Message

Notice the message "*No Lender Branch Servicer History for the loan*" at the bottom of the screen. This means that there is no branch for the lender.

Guaranty Agency History

Notes:



To view information on the guaranty agencies that have guaranteed this loan:

Step 1: Type **GH** on the action bar of the *RC87 Lender History* screen.

Step 2: Type **S** next to the desired lender. As an example, type **S** next to the first available choice.

Step 3: Press **ENTER**.

```

RC89  —  Aid profile 1(A1)   Loan Detail(LD)   Lender History(LH)
        Loan history(LO)

                                NSLDS                      03-16-1998
                                Guaranty Agency History      09:08:26

Student Name: GREGORY          T COLLINS                   SSN: 043865160
PLUS Name...: LESLIE          J BENKOVIC                 SSN: 052727808

Loan Type: SU  Amount:  5000      Certification/Guaranty Date...: 01-26-1995
Period Begin Date....: 09-12-1994  Period End Date.....: 05-02-1995

GA Code: 725   GA Name: AMERICAN STUDENT ASSISTANCE
GA Street Address.....: 330 STUART STREET
City.....: BOSTON                      State: MA  Zip Code: 021165292
Responsible Begin Date: 01-26-1995

GA Code:       GA Name:
GA Street Address.....:
City.....:     State:      Zip Code:
Responsible Begin Date:

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
  
```

RC89 Guaranty Agency History

The screen shows the following guaranty agency information for the specific loan record selected, in date order:

- ♦ guaranty agency name,
- ♦ address, and
- ♦ responsible begin date.

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School Branch Servicer History

From the RC89 Guaranty Agency History screen:

Step 1: Press **F3** to return to the RC83 Loan History Selection screen.

Step 2: Type **SH** on the action bar.

Step 3: **TAB** to the desired loan record and type **S**. As an example, select the first loan of type "PU" (Perkins).

Step 4: Press **ENTER**.

If there is no school branch servicer, a message will appear at the bottom of the RC83 Loan History Selection screen.

Notes:



RC83	<input checked="" type="checkbox"/> SH	Aid profile 1(A1)	Loan Detail(LD)	Lender History(LH)
		Guar agency Hist(GH)	Attendance His(AH)	School servicer His(SH)

NSLDS 03-16-1998
Loan History Selection 09:08:27

Student Name: GREGORY T COLLINS SSN: 043865160
 PLUS Name...: LESLIE J BENKOVIC SSN: 052727808
 Current School/Branch Code: 00214600
 Current School Name.....: EMERSON COLLEGE
 City.....: BOSTON State: MA

Sel	Loan Type	Certification/ Guaranty Date	Period Begin Date	Period End Date	Amount	Curr Loan Status	MORE: + Originating School/Branch
-	SU	01-26-1995	09-12-1994	05-02-1995	5000	RP	00214600
-	SF	09-22-1994	09-12-1994	05-02-1995	5500	RP	00214600
-	SL	12-03-1993	09-13-1993	05-03-1994	4000	RP	00214600
-	SF	11-03-1993	09-13-1993	05-03-1994	3500	RP	00214600
<input checked="" type="checkbox"/> S	PU	10-04-1993	09-13-1993	05-03-1994	1000	PF	00214600
-	SF	10-23-1992	09-14-1992	05-06-1993	2625	RP	00214600
-	PU	10-05-1992	09-14-1992	05-03-1993	1000	PF	00214600

PRIVACY ACT OF 1974 (AS AMENDED)

RC862-I: No School Branch Servicer History for the loan

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

**RC83 Loan History Selection Screen Showing
"No School Branch Servicer History" Message**

If there is a school branch servicer, the RC90 School Branch Servicer History screen will display. (See the example below.)

Notes:



RC90	Aid profile 1(A1)	Loan Detail(LD)	Loan history(LO)
NSLDS		03-16-1998	
School Branch Servicer History		09:08:28	
Student Name: CHRIS W LAMBART		SSN: 037000002	
PLUS Name...:		SSN:	
Sch/Br Code.: 00165600	Name: CHICAGO COLLEGE OF CHIROPODY		
City.....: CHICAGO	State: IL	Zip Code: 60600	
Loan type.....: PU Amount: 3500 Certification Date: 08-25-1994			
Period Begin date: 09-01-1982		Period End date...: 05-31-1983	
MORE: +			
School Servicer Code: 001002 Name: SCHOOL SERVICER OF FLORIDA COLLEGE AT TAMPA			
Street Address: 1906 ORCHARD WAY			
City: TAMPA	State: FL	Zip Code: 190000001	
Responsible Begin date...: 03-01-1994		Responsible End Date: 01-01-1992	
School Servicer Code: 001001 Name: SERVICER FOR FLORIDA COLLEGES			
Street Address: 123 HICKORY STREET			
City: MIAMI	State: FL	Zip Code: 480960001	
Responsible Begin date...: 03-01-1995		Responsible End Date: 12-31-9999	
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN			

RC90 School Branch Servicer History

The RC90 School Branch Servicer History screen displays the following data in chronological order for a selected Perkins Loan:

- ◆ school/branch code and name,
- ◆ school/branch address,
- ◆ loan type and amount,
- ◆ certification date,
- ◆ period begin and end dates,
- ◆ school servicer code and name,
- ◆ school servicer address, and
- ◆ school servicer responsible begin and end dates.

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School Attendance History

Notes:



To view school attendance history data:

Step 1: On the *RC83 Loan History Selection* screen, type **AH** on the action bar.

Step 2: Press **ENTER**.

```

RC91  _  Transition History(TH)  Plus borrower Student selection(PS)
      LOan history(LO)  Enrollment History(EH)
-----
                                NSLDS                      03-16-1998
                                School Attendance History    09:08:29

Student Name: GREGORY          T COLLINS                      SSN: 043865160
PLUS Name...: LESLIE          J BENKOVIC                      SSN: 052727808
Sel  Make a Selection(S) for Transition History OR Enrollment History  MORE:
_ School/Branch Code: 00214600  Type/Control: C
  Name: EMERSON COLLEGE
  Street Address: 100 BEACON STREET
  City: BOSTON                State: MA                Zip Code: 02116

_ School/Branch Code: 00993600  Type/Control: B
  Name: MIDDLESEX COMMUNITY COLLEGE
  Street Address: SPRINGS ROAD
  City: BEDFORD                State: MA                Zip Code: 017309124

School/Branch Code:           Type/Control:
Name:
Street Address:
City:                          State:                Zip Code:

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
  
```

RC91 School Attendance History

The *School Attendance History* screen displays the schools at which the student has received aid or an in-school deferment. This screen is useful in contacting a school where the student has received aid. Also, if the school has sent enrollment history data to NSLDS via the SSCR process, information about the school will be displayed on this screen.

School Transition History

Notes:



To find out if a school has operated under a different name:

Step 1: From the *RC91 School Attendance History* screen, type **TH** on the action bar.

Step 2: **TAB** to the desired selection and type **S**. As an example, select the first available choice.

Step 3: Press **ENTER**.

A message will appear at the bottom of the *RC91 School Attendance History* screen if the school has not operated under another name.

```

RC91  TH Transition History(TH)   Plus borrower Student selection(PS)
      LOan history(LO)   Enrollment History(EH)

                               NSLDS                               03-16-1998
                               School Attendance History           09:08:30

Student Name: GREGORY          T COLLINS                          SSN: 043865160
PLUS Name...: LESLIE          J BENKOVIC                          SSN: 052727808
Sel Make a Selection(S) for Transition History OR Enrollment History MORE:
S School/Branch Code: 00214600   Type/Control: C
    Name: EMERSON COLLEGE
    Street Address: 100 BEACON STREET
    City: BOSTON                State: MA                Zip Code: 02116

_ School/Branch Code: 00993600   Type/Control: B
    Name: MIDDLESEX COMMUNITY COLLEGE
    Street Address: SPRINGS ROAD
    City: BEDFORD               State: MA                Zip Code: 017309124

School/Branch Code:           Type/Control:
Name:
Street Address:
City:                         State:                Zip Code:

                               PRIVACY ACT OF 1974 (AS AMENDED)

RC901-I: No Transition History exists for this School

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
  
```

*RC91 School Attendance History Screen Showing
"No School Transition History" Message*

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Notes:

RC92 School Transition History

- ◆ previous school/branch code,
- ◆ previous school name, and
- ◆ start date for each new school/branch code and name.

Access to school transition history information is available only from the *RC91 School Attendance History* screen.

Enrollment History

Notes:



To access a student's enrollment history:

Step 1: From the *RC91 School Attendance History* screen, type **EH** on the action bar.

Step 2: **TAB** to the school you wish to select and type **S**. As an example, select the first available choice.

Step 3: Press **ENTER**.

RC94		
NSLDS		03-16-1998
Enrollment History		09:08:32
Student Name: GREGORY	T COLLINS	SSN: 043865160
PLUS Name...: LESLIE	J BENKOVIC	SSN: 052727808
School/Branch Code: 00214600		
Name.....: EMERSON COLLEGE		
Enrollment		MORE:
Code	Description	Effective Date
G	GRADUATED	12-31-1995
F	FULL TIME	09-22-1994
PRIVACY ACT OF 1974 (AS AMENDED)		
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN		

RC94 Enrollment History

The *RC94 Enrollment History* screen displays a student's enrollment history at a given school, with the following information:

- ◆ school/branch code,
- ◆ school name,
- ◆ enrollment codes,
- ◆ description of enrollment codes, and
- ◆ effective dates.

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PLUS LOAN BORROWERS

Press **F3** until you reach the *RC00 Reporting Capabilities Main Menu*. Then type **4** (*Borrower Tracking Security*) and press **ENTER**. This is the best way to obtain an unpopulated *RC80 Student/Borrower Search* screen.

PLUS Borrower Student Selection

You can access a parent's loan information two ways: with student or parent data.

Method 1—Using Student Data

Step 1: **TAB** to the SSN field on the *RC80 Student/Borrower Search* screen and type the *student's SSN, first name, and DOB*. As an example, use the following data:

- ◆ SSN: 043 90 1308
- ◆ First Name: Jennifer
- ◆ DOB: 11-17-1972

Step 2: In the PLUS Borrower (P)/Student(S) field, the **S** (for Student) is already present, so just press **ENTER** to populate the screen for this student.

Step 3: Type **PS** on the action bar and press **ENTER** to display the *RC82 PLUS Borrower Student Selection* screen.

Notes:



RC82 — Loan History(LO) Attendance History(AH)

NSLDS	03-16-1998
PLUS Borrower Student Selection	09:08:33

Student

First Name: JENNIFER	Middle Initial: S	SSN: 043901308	State:
Last Name.: ALVARADO		DOB: 11-17-1972	

PLUS Borrowers Associated with Student		MORE:	
Sel First	M Last	DOB	State SSN
— SUZANNE	M MORRIS	07-23-1941	NH 053646721

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC82 PLUS Borrower Student Selection Screen
Accessed Using Student Identification Data

Method 2—Using Parent Data

Press **F3** until you reach the *RC00 Reporting Capabilities Main Menu*. Then type **4** (*Borrower Tracking Security*) and press **ENTER**. This is the best way to obtain an unpopulated *RC80 Student/Borrower Search* screen.

Step 1: **TAB** to the SSN field on the *RC80 Student/Borrower Search* screen and type the *parent's SSN, first name, and DOB*. As an example, use the following data:

♦ SSN: 053 64 6721

♦ First Name: Suzanne

♦ DOB: 07-23-1941

Step 2: In the PLUS Borrower (P)/Student(S) field, type **P** (for Parent) and press **ENTER** to populate the screen for this parent PLUS borrower.

Step 3: Type **PS** on the action bar and press **ENTER** to display the *RC82 PLUS Borrower Student Selection* screen.

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RC82 Loan History (LO) Attendance History (AH)			
NSLDS		03-16-1998	
PLUS Borrower Student Selection		09:08:34	
PLUS Borrower			
First Name: SUZANNE	Middle Initial: M	SSN: 053646721	State:
Last Name.: MORRIS		DOB: 07-23-1941	
Students Associated with PLUS Borrower			MORE:
Sel First	M Last	DOB	State SSN
- JENNIFER	S ALVARADO	11-17-1972	043901308
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN			

RC82 PLUS Borrower Student Selection Screen
Accessed Using Parent Identification Data

The *RC82 PLUS Borrower Student Selection* screen allows you to view all students associated with a PLUS borrower or all PLUS borrowers associated with a student, depending on whether you entered **parent** or **student** identification data on screen *RC80*.

IMPORTANT NOTE: Now that you have accessed the *RC82 PLUS Borrower Student Selection* screen, the other screens you display will be **limited to data on PLUS loans and parent borrowing**.

- ◆ For example, you are next going to access the *RC83 Loan History Selection* screen.
- ◆ When you viewed this screen earlier in this session, it displayed data only on **student** loans.
- ◆ However, when you now access the same screen, it will display data only on **PLUS loans and parent borrowing**.

Loan History (PLUS Borrower)

Notes:



To access loan history information:

Step 1: From the *RC82 PLUS Borrower Student Selection* screen, type **LO** on the action bar.

Step 2: Press **ENTER**.

RC83 — Aid profile 1(A1) Loan Detail(LD) Lender History(LH)
 Guar agency Hist(GH) Attendance His(AH) School servicer His(SH)

NSLDS 03-16-1998
 Loan History Selection 09:08:35

Student Name: JENNIFER S ALVARADO SSN: 043901308
 PLUS Name...: SUZANNE M MORRIS SSN: 053646721
 Current School/Branch Code: 00257500
 Current School Name.....: FRANKLIN PIERCE COLLEGE
 City.....: RINDGE State: NH

Loan Sel	Type	Certification/ Guaranty	Period Begin Date	Period End Date	Amount	Curr Loan Status	MORE: Originating School/Branch
—	PL	08-05-1993	09-08-1993	05-17-1994	3090	RP	00257500
—	PL	08-05-1992	09-09-1992	05-18-1993	4000	RP	00257500
—	PL	01-21-1992	09-09-1991	05-17-1992	4000	RP	00257500

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC83 Loan History Selection (PLUS Borrower)

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The *RC83 Loan History Selection* screen provides a summary of all the loans associated with a specific PLUS borrower. It will also identify any consolidated loans.

This screen displays:

- ◆ loan type,
- ◆ certification/guaranty date,
- ◆ loan period begin and end dates,
- ◆ loan amount,
- ◆ current loan status, and
- ◆ originating school/branch.

Notes:



Loan Detail (PLUS Borrower)

To access loan detail information:

Step 1: From the *RC83 Loan History Selection* screen, type **LD** on the action bar.

Step 2: **TAB** to the desired loan record and type **S**. As an example, type **S** next to the first loan of type "PL."

Step 3: Press **ENTER**.

The *RC86 Loan Detail* screen displays the current loan status as well as other details.

Notes:



RC83 ☒ LD Aid profile 1(A1) Loan Detail(LD) Lender History(LH)
 Guar agency Hist(GH) Attendance His(AH) School servicer His(SH)

NSLDS 03-16-1998
 Loan History Selection 09:08:36

Student Name: JENNIFER S ALVARADO SSN: 043901308
 PLUS Name...: SUZANNE M MORRIS SSN: 053646721
 Current School/Branch Code: 00257500
 Current School Name.....: FRANKLIN PIERCE COLLEGE
 City.....: RINDGE State: NH

Loan	Certification/	Period	Period		Curr	MORE:
Sel Type	Guaranty Date	Begin Date	End Date	Amount	Status	Loan Originating School/Branch
<input checked="" type="checkbox"/> S	PL	08-05-1993	09-08-1993	05-17-1994	3090	RP 00257500

RC86 — Aid profile 1(A1) Lender History(LH) Guaranty agency History(GH)
 School servicer History(SH) LOan history(LO)

NSLDS 03-16-1998
 Loan Detail 09:08:37

F3=EXIT Student Name: JENNIFER S ALVARADO SSN: 043901308
 PLUS Name...: SUZANNE M MORRIS SSN: 053646721
 Loan Type: PL Amount: 3090 Certification/Guaranty Date: 08-05-1993
 Period Begin Date....: 09-08-1993 Period End Date.....: 05-17-1994

Outstanding Principal Bal: 1797 Outstanding Principal Bal Date: 06-30-1996
 Outstanding Interest Bal.: 11 Outstanding Interest Bal Date.: 06-30-1996

MORE:
 -- Disbursement -- -- Cancellation -- ---- Refund ---- ---- Status ----
 Date Amount Date Amount Date Amount Date Code
 08-16-1993 3090 08-16-1993 RP

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

Navigation Schematic for RC86 Loan Detail (PLUS Borrower)

Lender History (PLUS Borrower)

Notes: _____



To access lender history:

Step 1: From the *RC86 Loan Detail* screen,
type **LH** on the action bar.

Step 2: Press **ENTER** to display the *RC87
Lender History* screen.

RC87	___	Aid profile 1(A1)	Loan Detail(LD)	Lender Br serv his(LB)
		Guar agency His(GH)	LOan history(LO)	
NSLDS			03-16-1998	
Lender History			09:08:38	
Student Name: JENNIFER		S ALVARADO	SSN: 043901308	
PLUS Name...: SUZANNE		M MORRIS	SSN: 053646721	
Loan Type: PL		Amount: 3090	Certification/Guaranty Date...: 08-05-1993	
Period Begin Date....: 09-08-1993		Period End Date.....: 05-17-1994		
Sel		MORE:		
_ Lender Code...: 829988 Lender Branch Code: 0000 Phone Number: 6178491325				
Lender Name...: NELLIE MAE - TREASURER				
Street Address: 50 BRAINTREE HILL PARK SUITE 300				
City.....: BRAINTREE		State: MA	Zip Code: 021840000	
Responsible Begin Date: 10-15-1995		Responsible End Date: 12-31-9999		
_ Lender Code...: 813843 Lender Branch Code: 0000 Phone Number: 6037884769				
Lender Name...: PEOPLES BANK OF LITTON				
Street Address: 3 MAIN STREET				
City.....: LITTLETON		State: NH	Zip Code: 035610000	
Responsible Begin Date: 08-05-1993		Responsible End Date: 10-14-1995		
PRIVACY ACT OF 1974 (AS AMENDED)				
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN				

RC87 Lender History (PLUS Borrower)

This screen provides a summary of all the lenders associated with a specific loan as well as information about the lender currently holding the loan and the lender's address.

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Guaranty Agency History (PLUS Borrower)

Notes:



To access guaranty agency information:

Step 1: At the *RC87 Lender History* screen, type **GH** on the action bar.

Step 2: **TAB** to the desired lender code and type **S**. As an example, type **S** next to the first lender code choice.

Step 3: Press **ENTER**.

RC89	—	Aid profile 1(A1)	Loan Detail(LD)	Lender History(LH)
		LOan history(LO)		
			NSLDS	03-16-1998
			Guaranty Agency History	09:08:40
Student Name:	JENNIFER	S ALVARADO	SSN:	043901308
PLUS Name....	SUZANNE	M MORRIS	SSN:	053646721
Loan Type:	PL	Amount: 3090	Certification/Guaranty Date...	08-05-1993
Period Begin Date....	09-08-1993	Period End Date.....	05-17-1994	
GA Code:	733	GA Name: NEW HAMPSHIRE HIGHER EDUCATION ASST.		
GA Street Address.....	P.O. BOX 877			
City.....	CONCORD	State:	NH	Zip Code: 033020000
Responsible Begin Date:	08-05-1993			
GA Code:	GA Name:			
GA Street Address.....				
City.....	State:	Zip Code:		
Responsible Begin Date:				
PRIVACY ACT OF 1974 (AS AMENDED)				
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN				

RC89 Guaranty Agency History (PLUS Borrower)

Aid Profile 1 (PLUS Borrower)

There are two aid profile screens—*RC84 Aid Profile 1* and *RC85 Aid Profile 2*.

The *Aid Profile 1* screen provides a summary of the parent's selected loan, as well as the current loan servicer.

To access *RC84 Aid Profile 1*:

Step 1: From the *RC89 Guaranty Agency History* screen, type **A1** on the action bar.

Step 2: Press **ENTER**.

Notes:



RC84 — Aid profile 2 (A2) Loan Detail (LD) Guaranty agency His (GH)
Lender History (LH) School servicer His (SH) LOan history (LO)

NSLDS 03-16-1998
Aid Profile 1 09:08:41

Student Name: JENNIFER S ALVARADO SSN: 043901308
PLUS Name...: SUZANNE M MORRIS SSN: 053646721
School/Branch Code: 00257500 School Status:
School Name.: FRANKLIN PIERCE COLLEGE
Address.....: COLLEGE ROAD
RINDGE NH 03461
School Branch Servicer Code:
Loan Period Begin Date.....: 09-08-1993 Loan Period End Date.: 05-17-1994
Certification/Guaranty Date: 08-05-1993 Loan Amount: 3090 Loan Type: PL
Outstanding Principal Bal...: 1797 Outstanding Principal Bal Date: 06-30-1996
Outstanding Interest Bal...: 11 Outstanding Interest Bal Date.: 06-30-1996
Current Lender/Br: 829988 0000 Name: NELLIE MAE - TREASURER
Lender Branch Address: 50 BRAINTREE HILL PARK SUITE 300
BRAINTREE MA 021840000 Phone: 6178491325
Current Lender Branch Servicer: 700043

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F12=RETURN

RC84 Aid Profile 1 (PLUS Borrower)

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Aid Profile 2 (PLUS Borrower)

Notes: _____

To access the *Aid Profile 2* screen:

Step 1: From the *RC84 Aid Profile 1* screen,
type **A2** on the action bar.

Step 2: Press **ENTER**.

RC85	Loan Detail(LD) Loan history(LO)	Lender History(LH)	Guaranty agency His(GH)
	NSLDS Aid Profile 2		03-16-1998 09:08:42
Student Name:	JENNIFER S ALVARADO	SSN:	043901308
PLUS Name....:	SUZANNE M MORRIS	SSN:	053646721
Originating Lender:	813843	Name:	PEOPLES BANK OF LITTON
Address.....:	3 MAIN STREET LITTLETON	NH	035610000 Phone: 6037884769
Current Guaranty Agency:	733	Name:	NEW HAMPSHIRE HIGHER EDUCATION ASST.
Address.....:	P.O. BOX 877 CONCORD	NH	033020000
Originating Guar Agency:	733	Name:	NEW HAMPSHIRE HIGHER EDUCATION ASST.
Address.....:	P.O. BOX 877 CONCORD	NH	033020000
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT F12=RETURN			

RC85 Aid Profile 2 (PLUS Borrower)

The *RC85 Aid Profile 2* screen identifies the
originating lender, current guaranty agency,
and original guaranty agency.

School Branch Servicer History (PLUS Borrower)

This screen can be accessed from the RC83 *Loan History Selection* screen exactly as for student borrowers.

- ◆ School branch servicer history information only applies to Perkins Loans.

Notes:



School Attendance History (PLUS Borrower)

This screen can be accessed from the RC83 *Loan History Selection* screen exactly as for student borrowers.

- ◆ The information refers to the school the student was to attend when the parent applied for the PLUS loan.
- ◆ This does not mean that the parent attended this school.

School Transition History (PLUS Borrower)

This screen can be accessed from the RC91 *School Attendance History* screen exactly as for student borrowers.

Enrollment History (PLUS Borrower)

This screen can be accessed from the RC91 *School Attendance History* screen exactly as for student borrowers.

- ◆ The screen displays a student's enrollment status at a given school, not the parent's enrollment status.

CASE STUDIES

Notes:



CASE STUDY 1

Student

SSN: 043 90 0123

Name: Ian D. Sclar

DOB: 09-17-1975

Parent

SSN: 044 70 3105

Name: Brian D. McDonald

DOB: 04-06-1952

Ian attends the University of New Hampshire. He received financial aid; however, it did not cover his cost of attendance. Ian's father decides to borrow a PLUS loan to cover the remaining expenses. He wants to use the same lender he borrowed from previously, but doesn't remember the name of the lender.

What amount did Ian's father previously borrow and what is the name of the lender?

CASE STUDY 2

SSN: 043 86 8545
Name: James S. Cruz
DOB: 01-21-1973

James attends the University of California - Santa Barbara. Since James is graduating this year, he schedules an appointment to do an exit interview. At the exit interview, James is given a printout from his guaranty agency listing all his loans.

While reviewing the printout, James notices two loans that shouldn't be listed. As far as James knows, these loans were cancelled. James makes an appointment with his financial aid counselor concerning this matter. You are his financial aid counselor.

Were two of James' loans cancelled? If so, what were the amounts, and when were the loans cancelled?

Notes:



CASE STUDY 3

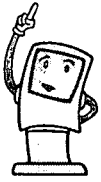
SSN: 043 84 8930
Name: Edward L. Ravelo
DOB: 08-03-1963

Edward L. Ravelo attends Newbury College. He has submitted two loan applications to the financial aid office. The information on the applications is the same except for the name—Edward wrote a different last name on each loan application.

Has Edward received loans under different names?

Notes:





ANSWER KEY

Notes:



CASE STUDY 1

Q. What amount did Ian's father previously borrow and what is the name of the lender?

Method 1—Using Student Data

Step 1: Navigate to the *Reporting Capabilities Main Menu* screen and choose *Borrower Tracking Security* to display an unpopulated *Student/Borrower Search* screen.

Step 2: **TAB** to the **SSN** field and key in the *student's SSN, First Name, and DOB*. In the **PLUS Borrower(P)/Student(S)** field, the **S** (for Student) is already present, so just press **ENTER** to populate the *RC80 Student/Borrower Search* screen.

Step 3: Type **PS** on the action bar and press **ENTER** to access the *RC82 PLUS Borrower Student Selection* screen.

Step 4: Type **LO** on the action bar and press **ENTER** to access the *RC83 Loan History Selection* screen.

Step 5: Type **LH** on the action bar and press **ENTER** to access the *RC87 Lender History* screen.

A. Ian's father borrowed \$3,550. The lender was New Hampshire Higher Ed Loan Corp.

Method 2—Using Parent Data

Step 1: Navigate to the *Reporting Capabilities Main Menu* screen and choose *Borrower Tracking Security* to display an unpopulated *Student/Borrower Search* screen.

Step 2: **TAB** to the SSN field and key in the *parent's SSN, First Name, and DOB*. In the PLUS Borrower(P)/Student(S) field, type **P** (for PLUS Borrower) and then press **ENTER** to populate the *RC80 Student/Borrower Search* screen.

Step 3: Type **PS** on the action bar and press **ENTER** to access the *RC82 PLUS Borrower Student Selection* screen.

Step 4: Type **LO** on the action bar and press **ENTER** to access the *RC83 Loan History Selection* screen.

Step 5: Type **LH** on the action bar and press **ENTER** to access the *RC87 Lender History* screen.

A. Ian's father borrowed \$3,550. The lender was New Hampshire Higher Ed Loan Corp.

Notes:



CASE STUDY 2

Q. Were two of James' loans cancelled? If so, what were the amounts, and when were the loans cancelled?

- Step 1: Navigate to the *Reporting Capabilities Main Menu* screen and choose *Borrower Tracking Security* to display an unpopulated *Student/Borrower Search* screen.
- Step 2: **TAB** to the SSN field and key in the student's **SSN**, **First Name**, and **DOB**. In the PLUS Borrower(P)/Student(S) field, the S (for Student) is already present, so just press **ENTER** to populate the *RC80 Student/Borrower Search* screen.
- Step 3: On the populated *Student/Borrower Search* screen, notice that James has received aid under another last name—"Mattei." To check the loans he received under that name, type **LO** on the action bar, type **S** on the selection bar for "James S. Mattei," and press **ENTER**. This brings you to the *RC83 Loan History Selection* screen.
- Step 4: None of the loans on the first *Loan History Selection* screen has a Current Loan Status of CA (Cancelled). However, there is a "+" in the MORE field, so press **F8** to view more loans. On the second screen, two loans have the CA code.
- Step 5: To view more information about the first cancelled loan, type **LD** on the action bar of the *RC83 Loan History Selection* screen, type **S** on the selection bar for the first cancelled loan record, and press **ENTER**. This brings you to the *RC86 Loan Detail* screen for the first cancelled loan.

Notes:



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Step 6: Press **F3** to return to the *RC83 Loan History Selection* screen and repeat step 5 for the other cancelled loan.

A. Two loans were cancelled for James:

- *A Federal Stafford Loan (Loan Type SF) for \$3,500 was cancelled on 10/18/94.*
- *An Unsubsidized Stafford Loan (Loan Type SU) for \$4,000 was cancelled on 10/19/94.*

Notes:



CASE STUDY 3

Q. Has Edward received loans under different names?

Step 1: Navigate to the *Reporting Capabilities Main Menu* screen and choose *Borrower Tracking Security* to display an unpopulated *Student/Borrower Search* screen.

Step 2: **TAB** to the **SSN** field and key in the student's **SSN**, **First Name**, and **DOB**. In the **PLUS Borrower(P)/Student(S)** field, the **S** (for Student) is already present, so just press **ENTER** to populate the **RC80 Student/Borrower Search** screen.

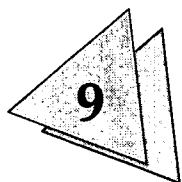
A. Edward has received loans using these two names:

- **Edward L. Ravelo**
- **Edward L. Crockett**

Notes:



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Student Status Confirmation Reports

Objectives

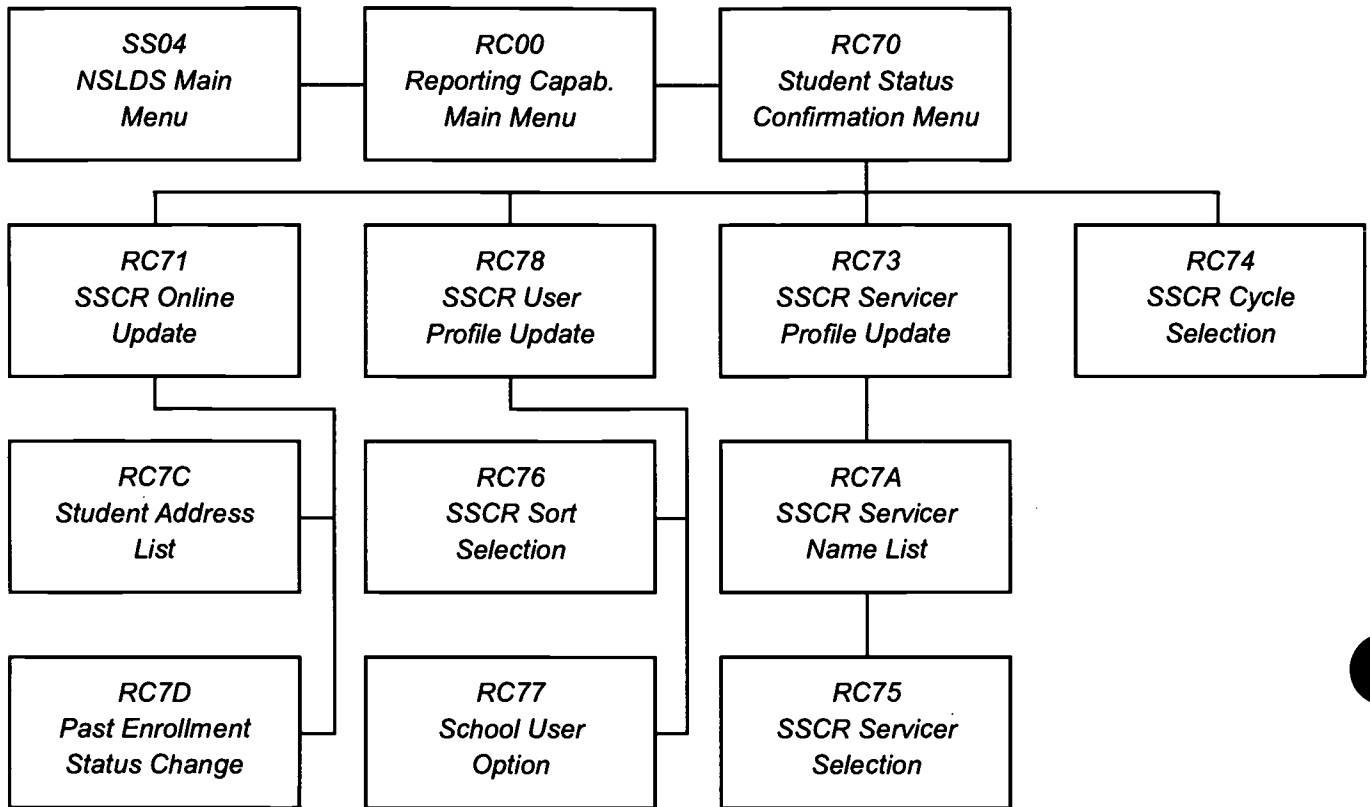
After completing this session, you will be able to:

- ◆ navigate through NSLDS's Student Status Confirmation Report (SSCR) screens, and
- ◆ update SSCR information online.

Contents

- ◆ Student Status Confirmation Update
- ◆ SSCR Cycle Selection
- ◆ Case Studies





Map of NSLDS's Student Status Confirmation Report Function

Introduction

There are two ways to update enrollment information in NSLDS—via batch request and online.

Batch Method: This method allows you to receive a single electronic Student Status Confirmation Report file, fully process it in your computing environment, and transmit the SSCR data back to NSLDS—again as a single file.

Online Method: This method allows you to update the enrollment data directly on the screens provided by NSLDS.

- ◆ When you need to correct a few student records on a previously submitted SSCR, or make an ad hoc report for a change in student status, online updating is appropriate.
- ◆ The EDExpress SSCR module lets you update and build a submittal file on your PC off-line (that is, without being connected to NSLDS) and transmit it using EDconnect.

Online Screen Navigation

The previous page shows a “map” of the screens included in NSLDS’s Student Status Confirmation Report function. Please pull out this page for reference during the rest of the session.

Notes:



Student Status Confirmation Menu

The SSCR function is accessed from the
NSLDS Main Menu as follows:

Step 1: At the *SS04 NSLDS Main Menu*,
type **2** (*Reporting Capabilities Main
Menu*).

Step 2: Press **ENTER**.

Step 3: At the *RC00 Reporting Capabilities
Main Menu*, type **6** (*Student Status
Confirmation Menu*).

Step 4: Press **ENTER**.

Notes:



SS04

NSLDS
NSLDS Main Menu

03-17-1998
12:15:47

Input the number of your choice and press ENTER.

- 2** 1. System Support Main Menu
2. Reporting Capabilities Main Menu

RC00

NSLDS
Reporting Capabilities Main Menu

03-17-1998
12:15:48

Input the number of your choice and press ENTER.

F3

- 6** 1. Aggregate Inquiry Main Menu
2. Default Rate Main Menu
3. Report Selection Menu
4. Borrower Tracking Security
5. Financial Aid Transcript Summary
6. Student Status Confirmation Menu

RC70

NSLDS
Student Status Confirmation Menu

03-17-1998
12:15:49

Input the number of your choice and press ENTER.

- 1. Student Status Confirmation Update
2. SSCR User Profile Update
3. SSCR Servicer Profile Update
4. SSCR Cycle Selection

F3=EXIT

Navigation Schematic for RC70 Student Status Confirmation Menu

The RC70 Student Status Confirmation Menu screen gives you four options:

1. Student Status Confirmation Update
2. SSCR User Profile Update
3. SSCR Servicer Profile Update
4. SSCR Cycle Selection

STUDENT STATUS CONFIRMATION UPDATE

Notes:



Choose the first option on the menu, *Student Status Confirmation Update*, as follows:

Step 1: Type 1.

Step 2: Press ENTER.

This brings you to the *RC71 SSCR Online Update* screen.

SSCR Online Update

The *RC71 SSCR Online Update* screen is used to view and change SSCR data.

```

RC71      D_ Display student(D)  Update sscr(U)  List Address(LA)
          Past enrollment Status change(PS)

          NSLDS                      03-17-1998
          SSCR Online Update          12:15:50

School/Branch Code... 00104600 TALLADEGA COLLEGE
SSN... First Name... DOB... (MM-DD-YYYY)
Last Name: Curr SSN.:
----- Current Student Status Change (Mandatory) -----
Anticipated Completion Date... (MM-DD-YYYY)
Enrollment Code... Enrollment Code Effect Date... (MM-DD-YYYY)
Certification Date... (MM-DD-YYYY)
Student Designator... (Optional)
---- Student Information Change (Optional) ----
SSN... First Name... Middle Initial...
Last Name... DOB... (MM-DD-YYYY)
--- Permanent Address Information (Optional) ---
Address line 1...
Address line 2...
City... State... Zip Code...
Country... Effective Date... (MM-DD-YYYY)

```

PRIVACY ACT OF 1974 (AS AMENDED)

RC004-I: Please enter key fields and press ENTER

F3=EXIT

RC71 SSCR Online Update

The action codes for the *RC71 SSCR Online Update* screen give you the following options:

- D** allows for display of information for a student identified by his or her SSN, first name, and date of birth.
- U** allows you to update a student's data.
- LA** lists a student's previous addresses.
- PS** allows you to change data on a student's past enrollment status or the dates of a student's past enrollment period.

Notes:



On the populated RC71 SSCR Online Update screen:

- ◆ The action bar at the top of the screen automatically displays the U (Update) action code.
- ◆ The cursor automatically advances to the Anticipated Completion Date field.
- ◆ A prompt at the bottom of the screen tells you *"Please make changes and press ENTER."*

This screen allows you to update the student's enrollment status and related SSCR information. The screen includes:

- ◆ anticipated completion date;
- ◆ enrollment code;
- ◆ enrollment code effective date;
- ◆ certification date;
- ◆ student designator (optional school ID for student);
- ◆ student information—SSN, first name, middle initial, last name, and date of birth; and
- ◆ permanent address data—street address, city, state, zip, country, and effective date.

The table on the next page lists the SSCR enrollment codes.

Notes:



CODES	ENROLLMENT STATUS
A	Approved Leave of Absence
D	Deceased
F	Full Time
G	Graduated
H	Half Time or More, But Less Than Full Time
L	Less Than Half Time
W	Withdrawn
X	Never Attended
Z	No Record Found

SSCR Enrollment Codes

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Update SSCR Student Information (SSCR Online Update Screen)

To update the student's enrollment data, you would:

Step 1: Type the following information in the appropriate fields on the *RC71 SSCR Online Update* screen:

- ◆ Anticipated Completion Date
- ◆ Enrollment Code
- ◆ Enrollment Code Effective Date
- ◆ Certification Date
- ◆ Student Designator (optional)

Step 2: Press ENTER.

Notes:



```

RC71      U  Display student(D)  Update sscr(U)  List Address(LA)
          Past enrollment Status change(PS)

          NSLDS                      03-17-1998
          SSCR Online Update          12:15:53

School/Branch Code... 00104600 TALLADEGA COLLEGE
SSN..043882658 First Name..COREY      DOB..12-06-1974 (MM-DD-YYYY)
Last Name: REED                      Curr SSN.: 043882658
----- Current Student Status Change (Mandatory) -----
Anticipated Completion Date..05-24-1998 (MM-DD-YYYY)
Enrollment Code..F Enrollment Code Effect Date....09-05-1997 (MM-DD-YYYY)
Certification Date.....03-17-1998 (MM-DD-YYYY)
Student Designator..741293 (Optional)
---- Student Information Change (Optional) ----
SSN..... First Name.. Middle Initial..
Last Name.. DOB... (MM-DD-YYYY)
--- Permanent Address Information (Optional)---
Address line 1..
Address line 2..
City..... State... Zip Code..
Country... Effective Date... (MM-DD-YYYY)
  
```

PRIVACY ACT OF 1974 (AS AMENDED)

AA022-I: Successfully UPDATED

F3=EXIT

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RC71 SSCR Online Update (After Updating Enrollment Information)

Student Address List

The *RC7C Student Address List* screen allows you to view all addresses associated with a student in the NSLDS database.

- ◆ When a student's address changes, you must update the new address for NSLDS.

Important: Before updating address data for a student, check that the address was not previously reported.

- ◆ If the address was previously reported, you can retrieve the previous address from the *RC7C Student Address List* screen and make it the new "permanent" address.

To list the addresses associated with a student, you would:

Step 1: Type **LA** on the action bar of the *RC71 SSCR Online Update* screen.

Step 2: Press **ENTER**.

If there are **no** addresses for this student in the database, the *RC71 SSCR Online Update* screen will display the message "*Address information is not available for the Student.*"

If there **are** addresses for this student already in the database, the *RC7C Student Address List* screen will show a list of them.

Notes:



To add a new address for a student:

On the RC71 SSCR Online Update screen, to add a new address for a student you would:

Step 1: Type U on the action bar.

Step 2: Type the following information in the appropriate fields:

- ◆ Address Lines 1 and 2
- ◆ City
- ◆ State
- ◆ Zip Code
- ◆ Country
- ◆ Effective Date

Step 3: Press ENTER.

Notes:



```

RC71      U  Display student(D)  Update sscr(U)  List Address(LA)
          Past enrollment Status change(PS)

          NSLDS                      03-17-1998
          SSCR Online Update         12:15:53

School/Branch Code... 00104600 TALLADEGA COLLEGE
SSN..043882658  First Name..COREY          DOB..12-06-1974 (MM-DD-YYYY)
Last Name: REED                               Curr SSN.: 043882658
----- Current Student Status Change (Mandatory) -----
Anticipated Completion Date..05-24-1998 (MM-DD-YYYY)
Enrollment Code..F  Enrollment Code Effect Date....09-05-1997 (MM-DD-YYYY)
                  Certification Date.....03-17-1998 (MM-DD-YYYY)
Student Designator..741293          (Optional)
----- Student Information Change (Optional) -----
SSN.....          First Name..          Middle Initial..
Last Name..          DOB...- - - (MM-DD-YYYY)
----- Permanent Address Information (Optional) -----
Address line 1..445 THIRD STREET
Address line 2..
City.....SILVER SPRING          State..MD  Zip Code..20901
Country..US          Effective Date..05-24-1998 (MM-DD-YYYY)

          PRIVACY ACT OF 1974 (AS AMENDED)

AA022-I: Successfully UPDATED

F3=EXIT
  
```

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RC71 SSCR Online Update (After Updating Address Information)

After entering the new address, to review the addresses associated with a student you would:

Notes:



Step 1: Type **LA** on the action bar of the *RC71 SSCR Online Update* screen.

Step 2: Press **ENTER**.

RC7C

NSLDS
Student Address List

03-17-1998
12:15:54

First Name: COREY Last Name: REED

SSN: 043882658

Sel Please make a selection(S) and press ENTER MORE:

- Address line 1: 445 THIRD STREET

Address line 2:

City.....: SILVER SPRING State: MD Zip: 20901

Country.....: US Effective Date: 05-24-1998

- Address line 1: 2030 F ST. NW

Address line 2:

City.....: MINNEAPOLIS State: MN Zip: 22563

Country.....: US Effective Date: 09-15-1997

Address line 1:

Address line 2:

City.....: State: Zip:

Country.....: Effective Date:

Address line 1:

Address line 2:

City.....: State: Zip:

Country.....: Effective Date:

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC7C Student Address List

To make a previously reported address the "permanent" address:

If the address was previously reported, you can retrieve the previous address from the *RC7C Student Address List* screen and make it the "permanent" address. To do this, you would:

Step 1: **TAB** to the desired address on the *RC7C Student Address List* screen, and type **S** to select it.

Step 2: Press **ENTER**.

The *RC71 SSCR Online Update* screen would redisplay, populated with the address information you selected from the *RC7C Student Address List* screen. The message "*Successfully UPDATED*" would appear, confirming the change.

Notes:



Past Enrollment Status Change

NSLDS stores all enrollment records that your school has submitted. To view the student's past enrollment, you would:

Step 1: Type **PS** on the action bar of the *RC71 SSCR Online Update* screen.

Step 2: Press **ENTER**.

This would bring you to the *RC7D Past Enrollment Status Change* screen.

Notes:



RC7D Add(A) Change(C) Delete(DE)

NSLDS
Past Enrollment Status Change

03-17-1998
12:15:55

Sch/Br Code.: 00104600 TALLADEGA COLLEGE

Student Name: COREY

REED

SSN: 043882658

Anticipated Compl Date: 05-24-1998 (MM-DD-YYYY)

(MM-DD-YYYY)

Enrollment Code.._ Effective Date.._ _ _ Cert Date.._ _ _

----- Current Status -----

Enroll Code: F Effec Date: 09-05-1997 Cert Date: 09-15-1997 Source: SSCR

Make a selection(S) and press ENTER for UPDATE or DELETE

Enroll

Sel Code

Description

Effec Date Certi Date

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC7D Past Enrollment Status Change

The *RC7D Past Enrollment Status Change* screen allows you to access and make online changes to a student's past enrollment status. You can add, change, and delete data such as:

- ◆ enrollment code,
- ◆ effective date, and
- ◆ certification date.

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Past Enrollment Status Change— "Add" Option

The Add option allows you to add online an enrollment period that was not previously reported. To add an enrollment period, you would:

- Step 1. Type **A** on the action bar of the *RC7D Past Enrollment Status Change* screen.
- Step 2. Fill in the **Enrollment Code**, **Effective Date**, and **Certification Date** fields.
- Step 3. Press **ENTER**.

Notes:





Sch/Br Code.: 00104600 TALLADEGA COLLEGE
Student Name: COREY REED SSN: 043882658
Anticipated Compl Date: 05-24-1998 (MM-DD-YYYY) (MM-DD-YYYY)
Enrollment Code..A Effective Date..10-01-1996 Cert Date..03-17-1998

Sch/Br Code.: 00104600 TALLADEGA COLLEGE
Student Name: COREY REED SSN: 043882658
Anticipated Compl Date: 05-24-1998 (MM-DD-YYYY) (MM-DD-YYYY)
Enrollment Code..A Effective Date..10-01-1996 Cert Date..03-17-1998

```
----- Current Status -----
Enroll Code: F  Effec Date: 09-05-1997  Cert Date: 03-17-1998  Source: SSCR
Make a selection(S) and press ENTER for UPDATE or DELETE
```

Enroll Sel Code	Description	Effec Date	Certi Date
- A	APPROVED LEAVE OF ABSENCE	10-01-1996	03-17-1998

PRIVACY ACT OF 1974 (AS AMENDED)

AA017-I: Successfully ADDED

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC7D Past Enrollment Status Change—Adding the First Enrollment Record

Past Enrollment Status Change— "Change" Option

The Change option allows you to edit a student's enrollment period information online.

As an example, suppose there is an error in the effective date of the sample student's period of less than half time enrollment. To correct the effective date, you would:

- Step 1: Type **C** on the action bar.
- Step 2: **TAB** past the Enrollment Code field to the Effective Date field and key in the new date.
- Step 3: In the Certification Date field, key in today's date.
- Step 4: In the Current Status section, type **S** next to the desired choice—the Less Than Half Time record.
- Step 5: Press **ENTER**.

Notes:



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RC7D C Add(A) Change(C) Delete(DE)

NSLDS 03-17-1998
Past Enrollment Status Change 12:16:00

Sch/Br Code.: 00104600 TALLADEGA COLLEGE
 Student Name: COREY REED SSN: 043882658
 Anticipated Compl Date: 05-24-1998 (MM-DD-YYYY) (MM-DD-YYYY)
 Enrollment Code..L Effective Date..09-09-1993 Cert Date..03-17-1998
 ----- Current Status -----
 Enroll Code: F Effec Date: 09-05-1997 Cert Date: 03-17-1998 Source: SSCR
 Make a selection(S) and press ENTER for UPDATE or DELETE

Enroll MORE:

Sel Code	Description	Effec Date	Certi Date
- A	APPROVED LEAVE OF ABSENCE	10-01-1996	03-17-1998
<u>8</u> L	LESS THAN HALF TIME	01-12-1994	03-17-1998

RC7D — Add(A) Change(C) Delete(DE)

NSLDS 03-17-1998
Past Enrollment Status Change 12:16:01

Sch/Br Code.: 00104600 TALLADEGA COLLEGE
 Student Name: COREY REED SSN: 043882658
 Anticipated Compl Date: 05-24-1998 (MM-DD-YYYY) (MM-DD-YYYY)
 Enrollment Code..L Effective Date..09-09-1993 Cert Date..03-17-1998
 ----- Current Status -----
 Enroll Code: F Effec Date: 09-05-1997 Cert Date: 03-17-1998 Source: SSCR
 Make a selection(S) and press ENTER for UPDATE or DELETE

Enroll MORE:

Sel Code	Description	Effec Date	Certi Date
- A	APPROVED LEAVE OF ABSENCE	10-01-1996	03-17-1998
- L	LESS THAN HALF TIME	09-09-1993	03-17-1998

PRIVACY ACT OF 1974 (AS AMENDED)

AA022-I: Successfully UPDATED

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC7D Past Enrollment Status Change—Changing an Enrollment Record

The changes have been made, as shown in the Current Status section. The message "Successfully UPDATED" is displayed at the bottom of the screen.

Past Enrollment Status Change— "Delete" Option

This option lets you delete an enrollment period previously reported for a student.

As an example, suppose the sample student was not actually enrolled for the 1993-94 academic year. To delete this enrollment period, you would:

Step 1: Type **DE** on the action bar.

Step 2: In the Current Status section, type **S** next to the desired choice—the Less Than Half Time record.

Step 3: Press **ENTER**.

Notes:



RC7D DE Add(A) Change(C) Delete(DE)

NSLDS 03-17-1998
Past Enrollment Status Change 12:16:02

Sch/Br Code.: 00104600 TALLADEGA COLLEGE

Student Name: COREY REED SSN: 043882658

Anticipated Compl Date: 05-24-1998 (MM-DD-YYYY) (MM-DD-YYYY)

Enrollment Code..L Effective Date..09-09-1993 Cert Date..03-17-1998

----- Current Status -----
Enroll Code: F Effec Date: 09-05-1997 Cert Date: 03-17-1998 Source: SSCR
Make a selection(S) and press ENTER for UPDATE or DELETE

Enroll MORE:
Sel Code Description Effec Date Certi Date
- A APPROVED LEAVE OF ABSENCE 10-01-1996 03-17-1998
g L LESS THAN HALF TIME 09-09-1993 03-17-1998

RC7D Add(A) Change(C) Delete(DE)

NSLDS 03-17-1998
Past Enrollment Status Change 12:16:02

Sch/Br Code.: 00104600 TALLADEGA COLLEGE

Student Name: COREY REED SSN: 043882658

Anticipated Compl Date: 05-24-1998 (MM-DD-YYYY) (MM-DD-YYYY)

Enrollment Code..L Effective Date..09-09-1993 Cert Date..03-17-1998

----- Current Status -----
Enroll Code: F Effec Date: 09-05-1997 Cert Date: 03-17-1998 Source: SSCR
Make a selection(S) and press ENTER for UPDATE or DELETE

Enroll MORE:
Sel Code Description Effec Date Certi Date
- A APPROVED LEAVE OF ABSENCE 10-01-1996 03-17-1998

PRIVACY ACT OF 1974 (AS AMENDED)

AA018-I: Successfully DELETED

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC7D Past Enrollment Status Change—Deleting an Enrollment Record

The Less Than Half Time record has been deleted, as shown in the Current Status section. The message "Successfully DELETED" is displayed at the bottom of the screen.

SSCR CYCLE SELECTION

Notes:



To access the SSCR Cycle Selection screen:

Step 1: Press **F3** to return to the *RC70*
Student Status Confirmation Menu.

Step 2: Type **4** (*SSCR Cycle Selection*).

Step 3: Press **ENTER**.

RC70

NSLDS 03-17-1998
Student Status Confirmation Menu 12:16:13

Input the number of your choice and press ENTER.

4

1. Student Status Confirmation Update
2. SSCR User Profile Update
3. SSCR Servicer Profile Update
4. SSCR Cycle Selection

RC74 U Update(U)

NSLDS 03-17-1998
SSCR Cycle Selection 12:16:14

F3= School/Branch Code...: 00104600 TALLADEGA COLLEGE

Select the School Category

1. Quarter
2. Semester
3. Others

Cycle Number	Month	Last Generated	Required Indicator (Y)
1	JANUARY		-
2	FEBRUARY		-
3	MARCH		-
4	APRIL		-
5	MAY		-
6	JUNE		-
7	JULY		-
8	AUGUST		-
9	SEPTEMBER		-
10	OCTOBER		-
11	NOVEMBER		-
12	DECEMBER		-

RC747-I: Select a Category and Update SSCR cycle

F3=EXIT

Navigation Schematic for RC74 SSCR Cycle Selection

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The *SSCR Cycle Selection* screen prompts you to "Select a Category and Update SSCR cycle."

You must select one of the following School Categories:

1. Quarter
2. Semester
3. Others

The table below shows how many cycles you can select and how far apart they must be.

Notes:



SCHOOL CATEGORY	CYCLES
Quarter	Minimum of 3 cycles, 1 each regular term (Fall, Winter, and Spring), 3 months apart.
Semester	Minimum of 2 cycles, 1 each term (Fall and Spring), 4 months apart. If 4 or more cycles are selected, they must be 2 months apart.
Others	Minimum of 2 cycles, 4 months apart. If 5 or 6 cycles are selected, they must be 2 months apart.
Default	6 cycles, 1 every even month.

- Notes:
1. No more than 6 cycles may be selected.
 2. For term institutions, a minimum of 1 cycle is required for each term.

Scheduling SSCR Cycles

Step 1: Press the **HOME** key to bring the cursor to the action bar and type **U**.

Step 2: **TAB** to the School Category field.

Step 3: Type the number of the School Category. The cursor automatically advances to the Required Indicator column to the right of January.

Step 4: Type **Y** for each desired month, pressing **TAB** to advance to other months.

Step 5: Press **ENTER**.

Your SSCR schedule is updated and a confirmation message "*Successfully UPDATED*" is displayed at the bottom of the screen.

Notes:



RC74 U Update(U)

NSLDS
SSCR Cycle Selection

03-17-1998
12:16:15

School/Branch Code...: 00104600 TALLADEGA COLLEGE

Select the School Category

- 1 1. Quarter
2. Semester
3. Others

Cycle Number	Month	Last Generated	Required Indicator (Y)
1	JANUARY		<u>Y</u>
2	FEBRUARY		-
3	MARCH		<u>Y</u>
4	APRIL		-
5	MAY		<u>Y</u>
6	JUNE		-
7	JULY		-
8	AUGUST		-
9	SEPTEMBER		<u>Y</u>
10	OCTOBER		-
11	NOVEMBER		<u>Y</u>
12	DECEMBER		-

RC747-I: Select a Category and Update SSCR cycle

F3= RC74 U Update(U)

NSLDS
SSCR Cycle Selection

03-17-1998
12:16:16

School/Branch Code...: 00104600 TALLADEGA COLLEGE

Select the School Category

- 1 1. Quarter
2. Semester
3. Others

Cycle Number	Month	Last Generated	Required Indicator (Y)
1	JANUARY		<u>Y</u>
2	FEBRUARY		-
3	MARCH		<u>Y</u>
4	APRIL		-
5	MAY		<u>Y</u>
6	JUNE		-
7	JULY		-
8	AUGUST		-
9	SEPTEMBER		<u>Y</u>
10	OCTOBER		-
11	NOVEMBER		<u>Y</u>
12	DECEMBER		-

AA022-I: Successfully UPDATED

F3=EXIT

RC74 SSCR Cycle Selection—Scheduling the Desired Months

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Removing SSCR Cycles

To remove an existing cycle:

Step 1: On the *RC74 SSCR Cycle Selection* screen, check that the appropriate number is already entered in the School Category field—in our example, this should be the number "1".

Step 2: Advance to the month you want to remove by pressing **TAB** or using other methods of moving the cursor.

Step 3: Use the **DELETE** key to delete the **Y** at the March cycle (or type **N** over the **Y**).

Step 4: Press **ENTER**.

The **Y** is now removed from the March cycle, and a confirmation message "*Successfully UPDATED*" is displayed at the bottom of the screen.

Notes:



RC74 U Update(U)

NSLDS
SSCR Cycle Selection03-17-1998
12:16:17

School/Branch Code...: 00104600 TALLADEGA COLLEGE

Select the School Category

- 1 1. Quarter
2. Semester
3. Others

Cycle Number	Month	Last Generated	Required Indicator (Y)
1	JANUARY		Y
2	FEBRUARY		-
3	MARCH		[deleted]
4	APRIL		-
5	MAY		Y
6	JUNE		-
7	JULY		-
8	AUGUST		-
9	SEPTEMBER		Y
10	OCTOBER		-
11	NOVEMBER		Y
12	DECEMBER		-

RC74 U Update(U)

NSLDS
SSCR Cycle Selection03-17-1998
12:16:18

School/Branch Code...: 00104600 TALLADEGA COLLEGE

Select the School Category

- 1 1. Quarter
2. Semester
3. Others

Cycle Number	Month	Last Generated	Required Indicator (Y)
1	JANUARY		Y
2	FEBRUARY		-
3	MARCH		-
4	APRIL		-
5	MAY		Y
6	JUNE		-
7	JULY		-
8	AUGUST		-
9	SEPTEMBER		Y
10	OCTOBER		-
11	NOVEMBER		Y
12	DECEMBER		-

AA022-I: Successfully UPDATED

F3=EXIT

RC74 SSCR Cycle Selection—Removing the March Cycle

CASE STUDIES

Notes:



CASE STUDY 1

You will be given the identifiers for a "dummy" student in the NSLDS Training Database.

Use the SSCR function to update your student's enrollment information as follows:

- ◆ *Anticipated Completion Date:*
05-24-1998
- ◆ *Enrollment Code:* F
- ◆ *Enrollment Code Effective Date:*
09-05-1997
- ◆ *Certification Date:* use today's date
- ◆ *Student Designator:* 741293

CASE STUDY 2

You will be given the identifiers for a "dummy" student in the NSLDS Training Database.

Use the SSCR function to add a new address for your student as follows:

- ◆ *445 Third Street, Silver Spring, MD*
20901 US
- ◆ *Effective Date:* 05-24-1998

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CASE STUDY 3

You are logged on to the NSLDS Training Database for a specific school, as determined by your NSLDS Logon ID.

1. *Use the SSCR function to specify 6 SSCR cycles for your school, starting in February.*
2. *Use the SSCR function to change to 3 SSCR cycles for your school, starting in January.*

Notes:





ANSWER KEY

Notes:



CASE STUDY 1

See page Nine-11 for model procedures and screens relevant to this case study.

CASE STUDY 2

See pages Nine-12 through Nine-14 for model procedures and screens relevant to this case study.

CASE STUDY 3

See pages Nine-24 through Nine-29 for model procedures and screens relevant to this case study.

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Wrap Up

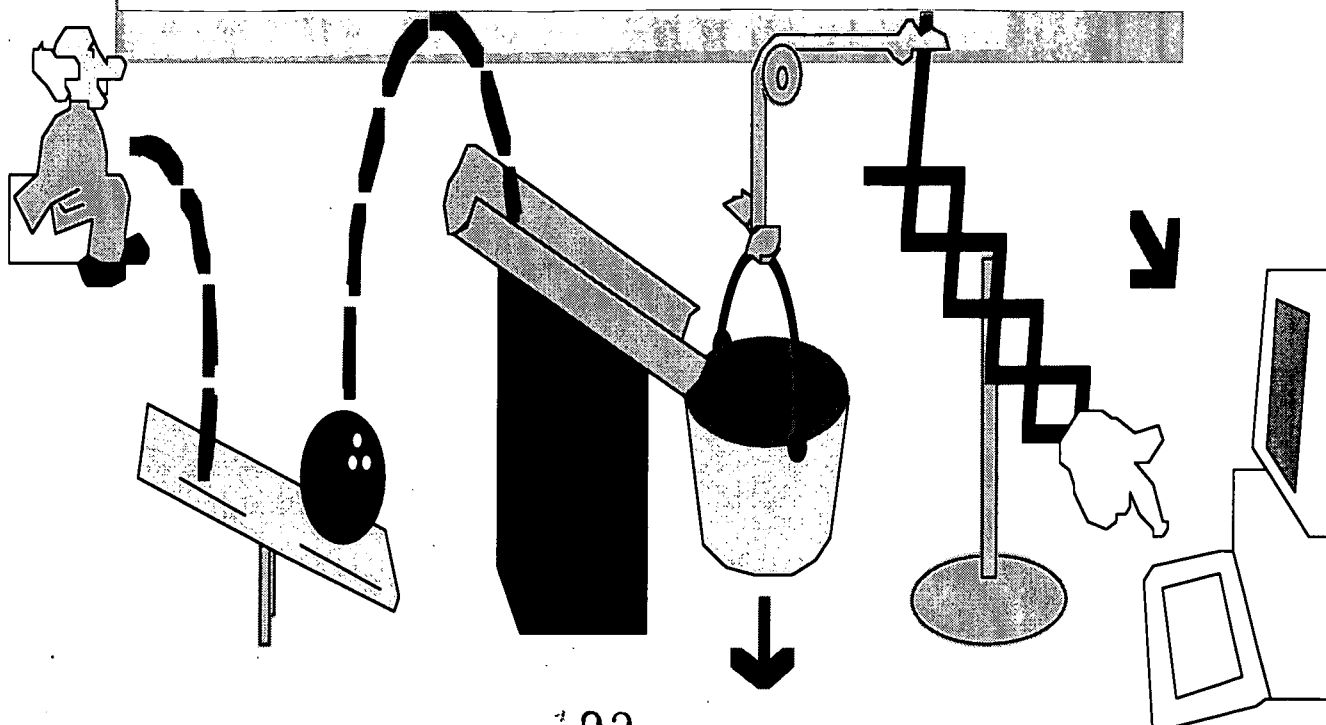
Objectives

By completing this session, you will:

- ♦ provide feedback on improving NSLDS, and
- ♦ provide feedback on improving the workshop.

Contents

- ♦ Wrap Up



WRAP UP

We often mentioned during this workshop that ED is interested in receiving your comments and suggestions for enhancing NSLDS. Throughout the workshop, you've been using the "NSLDS Recommendations Sheet" to jot down your ideas. Please include any other ideas you have now and hand in the sheets.

ED is also interested in your assessment of this workshop. Please complete ED's "Training Assessment Form" beginning on the next page of this Guide. The information you provide will help us make changes to future NSLDS Workshops.

Notes:





U.S. Department of Education
Office of Postsecondary Education
Student Financial Assistance Programs

Form Approved
OMB Number: 1840-0112
Expiration Date: 11/30/99

Training Assessment Form

Title IV Student Financial Assistance Programs

Date: _____ Region: _____ Location: _____

The information collected on this form will be used by Student Financial Assistance Programs to determine the effectiveness of the training and materials provided. Any information you provide will be deemed confidential. You are not required to answer any of the questions on this form. Names will not be published in any compilation of this data.

Identification of Respondent (optional)

Name _____ Position _____
Institution/Agency _____
Street or P.O. Box # _____
City _____
State _____ Zip Code _____
Type of Institution/College:
☐ One-year or less ☐ Public
☐ Two- or Three-year ☐ Private nonprofit
☐ Four-year or more ☐ Private proprietary
Length of time in financial aid related responsibilities: (years/months) _____
Title IV Programs you participate in: ☐ Federal Pell ☐ Federal Direct Loans
☐ Federal Family Educational Loan Programs ☐ Federal Campus-Based Programs

Training Content (Please respond to each of the following questions.)

1. Did the workshop provide information that you can apply to your work? Yes/No If No, why not?

2. Which sessions were the most beneficial to you?

3. Which sessions were the least beneficial to you?

4. How would you suggest the training content be expanded or reduced?

Training Facilities

5. Were you satisfied with the facilities (training room(s), hotel accommodations, location, accessibility, learning environment, etc.)?
Yes/No If No, why not?

Training Materials

6. Check all the phrases that describe the training *materials*, including the *overheads*:

- | | | |
|--|---|--|
| <input type="checkbox"/> Well-organized | <input type="checkbox"/> Consistent | <input type="checkbox"/> Useful charts and illustrations |
| <input type="checkbox"/> Difficult to follow | <input type="checkbox"/> Inconsistent | <input type="checkbox"/> Not enough charts and illustrations |
| <input type="checkbox"/> Clear and concise | <input type="checkbox"/> Contributed to my learning | <input type="checkbox"/> Relevant case studies and exercises |
| <input type="checkbox"/> Too complex | <input type="checkbox"/> Not relevant to my job | <input type="checkbox"/> Not enough case studies and exercises |
| <input type="checkbox"/> Accurate | <input type="checkbox"/> Attractive and attention-getting | <input type="checkbox"/> Useful for future reference |
| <input type="checkbox"/> Inaccurate | <input type="checkbox"/> Too detailed | <input type="checkbox"/> Other _____ |

Instructors

7. Circle Yes or No for each characteristic.

(Instructor's Name)	Clear Presenter ?		Well-Organized Presenter ?		Knowledgeable About Subject ?		Responsive To Questions ?		(Other Comments)
	Yes	No	Yes	No	Yes	No	Yes	No	
	Yes	No	Yes	No	Yes	No	Yes	No	
	Yes	No	Yes	No	Yes	No	Yes	No	
	Yes	No	Yes	No	Yes	No	Yes	No	
	Yes	No	Yes	No	Yes	No	Yes	No	
	Yes	No	Yes	No	Yes	No	Yes	No	
	Yes	No	Yes	No	Yes	No	Yes	No	

Comments

8. What suggestions would you offer to improve the workshop/materials? _____

9. What additional training would you like the U. S. Department of Education to provide? _____

10. Other Comments and Suggestions

(Please use this space and the back of this page to elaborate on any of the previous questions, or to make additional comments or suggestions about this training.)

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U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement (OERI)
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